

State of Wisconsin Department of Administration Division of Energy

Residential Energy Assistance Challenge Program Evaluation—Interim Report

March 31, 2005

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1. EXECUTIVE SUMMARY

In 2003, the Wisconsin Department of Administration (DOA) and the Social Development Commission of Milwaukee (SDC-Milwaukee) submitted a proposal to the Residential Energy Assistance Challenge Options (REACH) program to provide services that promote individual and family energy self-sufficiency to low-income households.

The agencies were awarded \$445,486 in FY2003 to provide these services to Milwaukee residents that reside within portions of three designated Community Development Block Grant (CDBG) strategic areas. The proposed plan took a holistic approach to program benefits, treating the family unit as a whole rather than purely concentrating on home energy use and improvements. The plan included:

- extensive case management services
- energy efficiency training through a model home demonstrating energy efficient techniques called the Energy House
- referrals to the state Weatherization Assistance Program
- home rehabilitation services
- financial counseling
- referrals to other programs
- home maintenance classes.

This interim report presents evaluation results based on process interviews of key staff implementing the program, participant surveys, and nonparticipant surveys. These data collection activities feed into the performance goals as identified in the REACH proposal¹.

Participant and nonparticipant survey results indicate there is a need for these types of services in this area. A significant percent of those interviewed have difficulty making their energy payments consistently, let alone fully. In addition, the reported number of disconnects among the nonparticipating population indicate there is a segment of the population the program has yet to reach.

REACH Milwaukee and DOA staffs believe that case management and the opportunity to work closely with a household over the course of the program is one of the most beneficial aspects of REACH. Working closely and consistently with families allows case managers to create personal family plans of action and ensures families are following through with those plans. A secondary outcome of the case management is the trust that families learn to place in their case managers.

The process interviews and participant surveys also found that the Energy House has been an effective method of providing energy education to individuals. The Energy House is a learning tool that helps individuals understand more about conserving energy using a hands-

¹ Social Development Commission and State of Wisconsin, Residential Energy Assistance Challenge Options (REACH) Proposal, REACH Milwaukee, July 9, 2003.

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on approach. While reading pamphlets and being told how to save energy may be useful, actually seeing how easy it is to conserve through demonstrations is far more powerful. Customer surveys indicate that not only are participants learning in the Energy House, but many are also applying what they learn.

Most pilot programs face problems that must be overcome in order to accomplish program goals. If these problems cannot be overcome, then goals must be revised. REACH Milwaukee is no exception. To date, the REACH Milwaukee program has not reached any of the performance targets as outlined in their proposed plan with the exception of providing energy education through the Energy House and fulfilling their Energy Assistance recipient targets.

The goals, interventions, and movement toward these performance targets are as follows.

Goal 1: Clients make consistent and timely energy bill payments

- **INTERVENTION 1:** Provide online Energy Assistance application for client households annually. This intervention would lead to decreased out-of-pocket costs.
(Target: 4,000 households)
- **INTERVENTION 2:** Negotiate with the local utility company for payment of arrearages including co-payment arrangements. As a result, client would remain connected to utilities and establish regular payment histories.
(Target: 300 clients)

SDC Milwaukee provided cash assistance to 6,566 households and established co-payment or arrearage forgiveness arrangements with 180 households in the target area through WHEAP². However, no REACH Milwaukee participants were set up with co-payment arrangements. REACH Milwaukee did not utilize the services of Energy Assistance to establish co-payments, nor did they arrange to receive electronic access to the Energy Assistance system so they could establish co-payments directly.

Goal 2: Clients decrease energy consumption

- **INTERVENTION 3:** Instruct clients and family members on energy conservation at the Energy House. As a result, clients learn how to decrease energy expenditures, and household energy consumption would decrease from first year of REACH to second year of REACH.
(TARGET: 1,500 clients become aware of how to decrease energy expenditures)
- **INTERVENTION 4:** Provide appliance/fixture maintenance information and training to clients. Clients will learn basic maintenance and appliance repair techniques and maintain at least one energy saving device on an on-going basis at home.
(Target: 250 clients participate, and 150 clients exhibit proficiency at skills)

It is in Intervention 3, through the Energy House, that REACH Milwaukee may be showing its greatest movement. Over 1,800 individuals toured the Energy House over the life of the program. Evaluation efforts indicate that the Energy House is having some effect in infusing energy conservation knowledge into participating households of those individuals

² These numbers represent participants from May through September, 2004.

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who take the tour. Additionally, respondents report putting some of this knowledge into action, which they believe will reduce their energy usage. At the time of this evaluation report, the Energy House continues to conduct tours and is expected to continue servicing SDC visitors.

Only 17 of the projected 250 participants enjoyed the benefits of home maintenance classes. Class participants were satisfied and reported using some of the techniques they learned in their home.

Goal 3: Clients improve financial literacy

- **INTERVENTION 5:** Provide financial literacy instruction for client households to enable clients to understand their financial plan, maintain full and timely utility bill payments, and experience no disconnections within one year.
(*TARGET: 300 clients participate, 150 clients understand their financial situations, and 75 maintain positive cash flow*)

The program anticipated that all REACH Milwaukee participants would receive some sort of financial literacy counseling and result in 75 households maintaining their positive cash flow. Only 19 participants actually received financial literacy training. Of those survey respondents who participated, approximately half reported making any changes to their financial plans or activities as a result of what they learned.

Goal 4: Clients improve overall housing and living conditions

- **INTERVENTION 6:** Provide clients with supplemental intensive case management in a holistic approach to meet the overall needs of the household. Case management involves referrals to other social service programs, which would in effect decrease out-of-pocket expenditures and help clients maintain positive cash flow.
(*TARGET: 300 clients*)
- **INTERVENTION 7:** Provide clients with home rehabilitation and weatherization support, improving health and safety, and overall conditions of the home.
(*TARGET: 30 clients for each service*)

At the time of this report, the program provided 96 clients with intensive case management services, and fulfilled their target of 30 households referred to weatherization services. Only 6 clients were referred to receive rehabilitation services.

However, only a small number of participants interviewed said weatherization and/or rehabilitations services were actually completed (6). Therefore, evaluators could not with confidence state there was any improvement in home conditions. Qualitatively, however, it does appear that there is some improvement, and that the program is reaching those with the highest home improvement needs. The longitudinal nature of this study will allow evaluators to contact households again next year and re-evaluate any potential changes in household and living conditions.

Goal 5: Clients build assets

- **INTERVENTION 8:** Assist clients in claiming all appropriate tax credits through free tax service, increasing households' income.
(*Target: 250 clients*)

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- **INTERVENTION 9:** Provide home buying counseling to REACH Milwaukee client households, educating renters on the home buying process, pre-qualifying renters for mortgages, and facilitating the purchase of their first home.
(Target: 50 clients pursue home buying opportunities, and 30 clients are pre-qualified for mortgages)
- **INTERVENTION 10:** Assist clients in improving environment and equity in home through assistance from REACH Milwaukee and weatherization services.
(Target: 30 homes weatherized)

Other than referring 30 households to receive weatherization services, the program has made little to no progress toward building client assets through tax assistance or home buying counseling. REACH Milwaukee staff could not determine how many individuals received free tax service, although two participants interviewed said they did benefit from that service. Only 7 households were provided with home buying counseling.

Barriers to program delivery and services

The program has experienced numerous barriers that stunted its ability to provide services to the degree initially projected.

- **Funding levels:** When developing the proposal, it was believed that the funding levels were distributed on an annual basis. Therefore, when REACH Milwaukee was awarded \$445,000, they believed the total would amount to approximately \$1.3 Million across three years. About a year into the program DOA and SDC recognized that the full funding was provided at the onset of the program, and amounted to \$445,000 *across all three years*, not per year. This had an impact on the services that could actually be provided.
- **Staff turnover:** Due to resource reallocations at SDC, the REACH Milwaukee program saw several management and staff turnovers across the program period, which may have affected program participation levels.
- **Weatherization contractor changes:** In 2004, the contract for OIC, the contractor that provided weatherization services to Milwaukee County households, was terminated and replaced by two contractors: SDC and La Casa de Esperanza. The switchover of contractors delayed weatherization services.
- **Level of family involvement required by program:** REACH Milwaukee requires that families be involved in the process. Case managers report that this requirement has deterred people from participating in the program.
- **View of ultimate program goals:** REACH Milwaukee staff report that households look to REACH Milwaukee to provide weatherization services, and do not easily respond to the offer of case management and other services that might help households become more self-sufficient.

The program, currently in the second year of its existence, is still very much in the construction phase. And, it must be recognized that it takes years for many programs to be fully functioning and run smoothly. With that said, evaluators believe that, given funding issues, REACH Milwaukee was overly aggressive in the targets and goals they established. The services REACH Milwaukee proposed offering were comparable to states that were awarded far larger grants.

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One way to strengthen the case management capabilities is to allow REACH Milwaukee staff electronic access to the Energy Assistance database system. Energy Assistance and REACH Milwaukee collect similar data to establish eligibility. Energy Assistance system access would eliminate some inefficiencies and burdens on applicants who are currently completing applications for each program separately. Also, evaluations of other pilot programs that established electronic links between programs, such as the Milwaukee Energy Linkage, show that connections between programs improve case management opportunities, timeliness, client service, and caseworker satisfaction³.

Also, the program is currently unclear about when a home “graduates” from the program. In other words, what measurements are in place to determine if a household is considered self-sufficient, energy and otherwise.

³ Tannenbaum, Bobbi, Richard Hasselman, Scott Pigg, and Kathy Kuntz. *Exploring Low-Income Program Alternatives: An Evaluation of Six Wisconsin Energy Bureau Pilots*. Energy Center of Wisconsin, September 1999.

2. INTRODUCTION

This report presents interim evaluation results for Milwaukee's Residential Energy Assistance Challenge (REACH) Option Program. This report details results for the first year in the two-year longitudinal study, and presents REACH Milwaukee's progress toward their initial program goals. Progress is measured through primary data collection activities, including interviews with REACH Milwaukee program staff, program participants and nonparticipants.

2.1 OVERVIEW OF REACH MILWAUKEE

The REACH program, funded from federal Low Income Home Energy Assistance Program (LIHEAP) leveraging funds, provides states with grants to "minimize the health and safety risks that result from high energy burdens on low income Americans, prevent homelessness as a result of inability to pay energy bills, increase the efficiency of energy usage by low income families, and target energy assistance to individuals who are most in need⁴."

In Federal Fiscal Year 2003 (FY2003), the state of Wisconsin Department of Administration—Division of Energy (DOA) and Social Commission of Milwaukee (SDC—Milwaukee) was awarded \$445,486 in REACH funds. The proposal submitted outlined an aggressive plan to offer holistic services to 300 households across a three-year period, and was designed to provide significant improvements in individual and family self-sufficiency across multiple venues. The major elements of the work plan are as follows:

1. Within ten months of award, 300 households will begin a consistent, monthly co-payment schedule.
2. Within 36 months of award, 150 clients will learn basic maintenance and appliance repair techniques with proficiency.
3. Within 36 months of award, 150 clients create and understand their personal financial plans and create positive cash flow for their families.
4. Within 36 months of award 90 clients will receive hands on energy training at the Energy House (a protocol home intended to demonstrate energy saving tips and techniques).
5. Within 36 months of award, 30 clients will receive home-buying counseling and become pre-qualified for mortgages and purchase their first home.

Benefits not outlined in this initial work plan, but included in the interventions, include:

1. Provide online Energy Assistance applications for 4,000 client households annually.
2. Instruct 2,200 clients and family members on energy conservation at the SDC Energy House.
3. Provide 30 clients with rehabilitation and/or weatherization support.

⁴ US Department of Health and Human Services, LIHEAP Clearing House (<http://www.ncat.org/liheap/reach.htm>).

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4. Provide intensive case management to 300 clients in a holistic approach to meet the overall needs of the household.
5. Assist 250 clients in claiming all appropriate tax credits through free tax service.

Table 2.1 presents the logic model upon which the initial program designed was based.

REACH Milwaukee's proposed target area consists of portions of three designated Community Development Block Grant (CDBG) strategic planning areas, encompassing two targeted zip codes. It also corresponds to the location of an Enterprise Community on Milwaukee's near south side. Within this geographic area reside over 84,000 residents and the population is growing. Slightly over 50% of the residents are tenants, with 30% living below the federal poverty level. The housing stock is aging and shows considerable deterioration; approximately 97% of the homes were built before 1950, with many of those homes having been constructed before the turn of the century.

Table 2.1: Initial REACH Milwaukee Logic Model

Assumptions	Program Intervention	Outcomes	Performance Indicator	Data Source
<p>1. With intensive and specific energy conservation and financial education, households learn how to decrease energy costs.</p> <p>2. By incorporating home rehabilitation, weatherization and routine maintenance activities learned in REACH Milwaukee training, the homeowner or renter will positively contribute to and enjoy more affordable and healthier housing options.</p>	1. Provide energy conservation training	Immediate: 4,500 client receive hands-on training at Energy House	Number of client who participate in Energy House	Program tracking system
		900 clients learn basic maintenance and appliance repair techniques	Number of clients who participate in maintenance and repair demonstrations	
		Intermediate: Increased energy conservation knowledge and attitudes.	Change in energy conservation knowledge and attitudes	Surveys with Energy House participants
		Final: Client decrease energy consumption	Percent of households with changed energy conservation behavior	Customer Telephone Surveys
	2. Provide financial education	Immediate: 300 households participate in monthly utility co-payment schedule	Number of households participating in co-payment	Program tracking system
		30 households receive home-buying counseling and become pre-qualified for mortgages	Number of households participating in home-buying program and pre-qualified	
		Intermediate: Households create and understand personal financial plan	Change in budgeting skills and financial planning practices	Customer surveys
		Final: Clients improve financial literacy, build assets, and make consistent and timely energy bill payments	Change in customer bill payment behavior, debts and assets	Customer surveys, utility bill payment data

2.2 EVALUATION PLAN SUMMARY

The evaluation plan addresses the two main evaluation objectives defined by the U.S. Office of Community Services (OCS), which are to:

1. Provide a process evaluation of the design and implementation of the REACH pilot.
2. Assess the pilot's outcomes for participants for the various pilot goals.

REACH Milwaukee is a three-year initiative (October 1, 2003, to September 30, 2006) and a four-year evaluation period (October 1, 2003, to September 30, 2007). REACH Milwaukee has two required evaluation reports. This interim report is the first of two required reports. The second, and final report, will be submitted OCS by September 30, 2007 (12 months after the pilot end).

2.3 DATA COLLECTION ACTIVITIES

The REACH evaluation plan includes five major data collection activities that support the outcome evaluation. Data collection instruments for each of these activities can be found in Appendix B.

1. **Process evaluations of REACH Milwaukee program and DOA staff:** These process interviews attempted to understand process issues related to program, including but not limited to: program uptake, program outreach, barriers to service and participation, funding requirements and limitations, and progress against performance goals. PA met or spoke with the REACH program manager DOA project manager throughout the course of the program. PA also met with both REACH Milwaukee case managers and the director of the Energy House.
2. **Surveys of individuals who toured the energy house:** Energy House demonstrators asked individuals who went through the energy house from October 1 through December 31 2004 to complete the Energy House survey immediately after the tour. Both English and Spanish versions of the instrument were available to respondents. During that time period, 152 individuals toured the Energy House, 114 of whom completed the survey for a 75% completion rate.

The Energy House survey focused on the energy saving activities presented in the tour, and specifically attempted to identify what activities the tour brought to their attention that they had never heard about, how much of what was presented could be applied in their own home, and if they believed they would save energy following the advice of the Energy House. In addition to this, the instrument probed into their reasons for entering the house and if they planned on telling anyone else about their experiences.

Respondents tended to say that they would do everything in their home that they saw in the Energy House – a socially biased response. Therefore, REACH participant surveys investigated what respondents actually *did* in their home in response to information presented in the Energy House per program design.

3. **Surveys of REACH participants:** To feed into the outcome evaluation and assess program performance against stated goals, PA conducted telephone surveys with all households that were actively participating in the program as of January 15, 2005. A total

of 51 out of 87⁵ participants responded to this survey for a 59% completion rate. Due to the high Hispanic population in the targeted area, the survey was conducted in both English and Spanish.

The telephone survey attempted to take an in-depth look into participants' experiences with the program and their home and living conditions. The evaluation planned for the participant survey to be conducted in February 2005 and then again in February 2006 with the same respondents. Developing this participant panel will allow evaluators to review program impact over time, not just as a one-year snapshot.

4. **Surveys of REACH nonparticipants:** To capture the incremental benefit of REACH Milwaukee's holistic approach, we are employing a quasi-experimental evaluation design through the use of a control group.

The nonparticipant survey spoke with 214 WHEAP recipients within the target zip codes who did not participate in REACH (45% completion rate). WHEAP recipients were chosen as the source of the nonparticipant sample because they represent the households that the program is targeting. Because the program does not serve households that reside in multi-family units (in this case defined as 3+ units), the sample included single family or 2-unit households. As is discussed in the next chapter, renters tend to be economically worse-off than homeowners; therefore, it is important to note that results are cannot be generalized to the eligible population in general. Due to the high Hispanic population in the targeted area, the survey was conducted in both English and Spanish.

The nonparticipant survey reviewed respondents' awareness of REACH, their interest in some of the services offered through the program, and the same home and living conditions discussed in the REACH participant survey. As is with the participants, the nonparticipant survey is designed to be a panel study where evaluators will talk with the same households a year after the initial data collection. This will allow evaluators to control for external conditions that may be affecting households beyond the program itself (i.e., energy costs and economic conditions).

5. **Utility payment and consumption analysis:** One of the primary client goals for REACH is for participating households to make consistent and timely energy bill payments. The participant survey solicits customer bill payment behavior. However, obtaining utility payment record information to assess changes in utility bill payment behavior can strengthen these self-reported findings. PA is working with We-Energies to obtain available payment stream and arrearage data for IFP households. In Year 4, this task will include data collection and cleaning and linking payment and potentially consumption information to completed customer surveys for early, preliminary analysis.

⁵ This number represents the adjusted sample, as survey contacts revealed that several households were no longer participating in the program because of a move out of the area.

2.4 REPORT ORGANIZATION

This report contains the Executive Summary (Chapter 1), this introductory chapter (Chapter 2), and four additional chapters:

1. Snapshot of program participants, eligible population, and Wisconsin population.
2. REACH Milwaukee: about the program.
3. Goals and Movement Toward Performance Targets.
4. Process issues for further exploration.

Appendix A presents a summary of other state's proposed REACH programs, Appendix B includes all data collection materials, and Appendix C details the survey response rates. Appendix D contains more detailed information on the Energy House Tour.

3. SNAPSHOT OF PROGRAM PARTICIPANTS, ELIGIBLE POPULATION, AND WISCONSIN POPULATION

REACH Milwaukee targets low-income households at or below 150% of the Federal Poverty Level (FPL) that reside within one of two Milwaukee zip codes: 53204 and 53215. As reported by DOA within their REACH proposal, over 84,000 residents live in this area and the population is growing. Slightly over 50% of the residents are tenants, with 30% living below the federal poverty level. The housing stock is old; approximately 97% of homes were built prior to 1950.

REACH Milwaukee's households include a relative high number of children under 6 and disabled members. Forty three percent of participating households have children under 6, and 35 percent have disabled members. Only 9 percent of households have elderly members 65 years of age or older.

Table 3.1 further characterizes the REACH participant population, REACH target population, and Wisconsin population by income, living costs, tenure, and nationality. The data clearly shows that REACH is targeting and reaching households that have a high need for programs such as this, particularly in comparison to the Wisconsin population as a whole. REACH participants have a significantly lower median annual household income, property values, and yet pay a similar amount of rent as the Wisconsin population. The REACH population is also significantly higher in terms of its Hispanic/Latino composition and is lower in the percent of individuals proficient in English.

3. Snapshot of Program Participants, Eligible Population, and Wisconsin Population...

Table 3.1: Demographics of Participant, Target Area, and Wisconsin Population*Crossed-off box indicates comparable data not available on Census website*

Demographic Descriptor	Participants	Eligible Population	Wisconsin	Number of Participant Observations
Median annual household income	\$18,000	\$29,545	\$43,791	85
Median property value (owners only, not including \$0)	\$70,000	\$65,543	\$109,900	60
Median property tax	\$1,719	\$1,572	\$2,245	64
Median monthly rent	\$500	\$476	\$540	20
Median mortgage payment	\$535			66
Average amount paid for electric (monthly)	\$71			87
Average amount paid for natural gas (monthly)	\$170			87
Average number of household members	3.9	3.0	2.5	88
Percent of households built before 1950	100%	72%	31%	24
Percent rent	23%	60%	32%	87
Percent own	77%	40%	68%	87
Percent Hispanic/Latino	76%	50%	4%	88
Percent proficient in English	63%	70%	99%	88

Source: REACH participant database and US Census Bureau, Census 2000 Summary File 3 Sample Data.

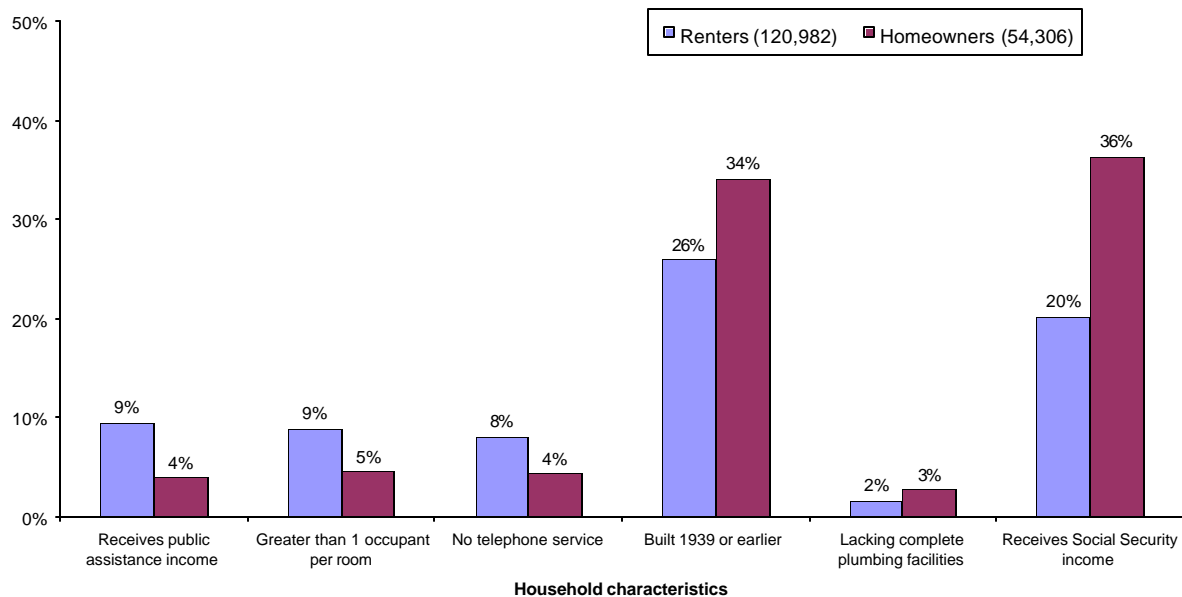
Only 23% of REACH participants are renters, compared to 60% of the target population. Conversations with case managers confirmed that renters are not specifically targeted and are not considered for the program if they reside in a building that with three or more units. They explained that the program design – and particularly the limited funding – makes it more difficult to weatherize a home that is renter-occupied and part of a multi-unit building. And while REACH is not a weatherization program, they would like all participants to have the option to be considered for weatherization and rehabilitation services.

With that said, research confirms that renters tend to be worse-off than owners in terms of income and living conditions. Wisconsin renters are significantly more likely to be in poverty than homeowners; 18% of renters are in poverty, compared with 4% of homeowners⁶. Also, a higher proportion of renters than owners in poverty receive public assistance (such as Wisconsin Works, or W-2), live in older housing structures, and lack telephone services (Figure 3.1).

⁶ U.S. Census Bureau, 2000 Census.

Therefore, renters may benefit substantially from the case management services the program offers, particularly financial counseling and energy efficiency education. In addition, one program goal is to assist renters in purchasing a home through first-time homebuyer programs and other targeted counseling efforts.

Figure 3.1: Comparison of Wisconsin Renters and Owners in Poverty



Source: U.S. Census Bureau, 2000 Census.

REACH participants participate in other social service programs; over three-quarter of recipients receive Medical Assistance, and two-thirds receive food stamps. Almost half also noted participating in We-Energies' CFL Pilot program, implemented at SDC in cooperation with REACH Milwaukee and the Energy Assistance Program. With the exception of W-2, program participants and nonparticipants are similar in the social service programs they use.

Table 3.2: Social Services Participation by REACH Milwaukee Participants and Nonparticipants

Service/Program	REACH Milwaukee Participants (n=51)	REACH Milwaukee Nonparticipants (n=114)
Food Stamp Program	67%	70%
Wisconsin Works (W-2)**	9%	21%
Women, Infant, and Children Program (WIC)	31%	25%
Medical Assistance	73%	73%
Housing Assistance	7%	12%
CFL Pilot through We-Energies	49%	37%
Childhood Lead Reduction Program	18%	11%

** Difference significant at the 90% confidence interval.
Source: REACH Participant and Nonparticipant surveys.

4. **REACH MILWAUKEE: ABOUT THE PROGRAM**

The REACH Milwaukee program takes a holistic approach to participant benefits. The program design incorporates elements of energy efficiency education and weatherization services to move households toward energy self-sufficiency, but also incorporates other services such as financial counseling and program referrals to assist households be more successful as a whole. As reported by all program implementers, the backbone of this program is the case management, and the ability for REACH staff to personally and closely work with participants to improve their energy use and living conditions.

REACH Milwaukee staff is composed of a project facilitator, a project manager, two case managers, and a financial specialist. A WRAP staff member is often a key player in the core REACH Milwaukee group as a member of the voting committee (discussed further in this document). REACH Milwaukee also has an advisory board made up of program partners, agencies that participants are referred to through the program, SDC staff, and We Energies. The advisory board serves as a steering committee.

REACH Milwaukee began enrolling households in the program in February 2004. At the time of this interim report, program staff reported that 88 households were active participants, defined as individuals who enrolled and were accepted into the program.

This chapter describes program benefits and performance targets, the process for enrolling and becoming a program participant, and barriers to program participation and service.

4.1 **PROGRAM BENEFITS AND PERFORMANCE TARGETS**

REACH Milwaukee is designed as an intensive case-management program to move families toward greater energy self-sufficiency, and living sufficiency in general. As such, the program requires families to participate to move themselves toward that ultimate goal.

The program proposed to provide services to two groups: those who tour the Energy House, and those who are accepted into the program and receive case management services (an Individual Family Plan (IFP)). Below we describe the Energy House and all the components that make up an IFP.

1. **Energy House.** The Energy House is the most innovative component of the program, and the component that reaches the greatest number of individuals. The Energy House provides energy efficiency education through a protocol of a home that would be typical for this Milwaukee area. The Energy House is located in the lobby of SDC, one location where Milwaukee residents apply for Energy Assistance. REACH staff conduct tours of the Energy House on a daily basis. Tours can run almost continuously during the busy season. Tours are conducted in both English and Spanish, and supporting documentation is multi-lingual as well.

The Energy House exemplifies many energy saving techniques throughout different rooms in the house, demonstrating how households can save energy and water. Tours describe the benefits of numerous energy-saving activities, such as installing compact fluorescent light bulbs, programmable thermostats, ENERGY STAR[®] appliances, water aerators, weather strips, and new furnaces, just to name a few. Located near many energy saving techniques is a poster that states how much energy can be saved by doing

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the activity mentioned. Appendix D provides in-depth information about the Energy House, and provides the reader with a visual tour.

The Energy House is the means of identifying program participants. Prior to taking the tour, visitors complete a guest-book that asks for their address. Potential participants are identified through the zip code (53204 or 53215) and are contacted after the tour by REACH staff who explain the program and attempt to enlist their participation in the program.

Below are services specific to REACH participants that receive an Individual Family Plan.

2. **Weatherization Services.** One component of REACH Milwaukee is the weatherization referral. Only 30 clients receive a weatherization referral through REACH Milwaukee. Although all participants are income eligible to receive benefits through the state Weatherization Assistance Program, REACH Milwaukee gives households priority to receive services.

Case managers build a case for families to fill a weatherization slot by assigning a score based on three components. The first component is a cost of shelter index, which takes into account the cost of living (cost of energy and rent/mortgage + property taxes) as a ratio of income. The second component is an expendable income index, which takes into account the money remaining after required bills are paid. This index is necessary because some families may not have shelter costs – such as an elderly family that has paid their mortgage off, but still sees very little income. The third component is an additional point given to households that have an elderly member.

Case managers present their suggested referrals to the voting committee, who reviews the referral based on two factors: an assessment of the structure performed by the REACH project manager, and the score assigned to the household.

3. **Rehabilitation Services.** REACH Milwaukee also provides home rehabilitation services to 30 homes at an average cost of \$15,000 per home. These services are earmarked for the homes that would not otherwise have been able to receive weatherization due to faults that would make weatherization ineffective (e.g., a roof in need of repair or replacement), or need improvements that weatherization could not cover. Examples of rehabilitation services homes could receive include: replacing and repairing roofs; repairing ceilings and drywall; replacing windows; making external improvements such as landscaping, new siding, and gutter replacements; and addressing health and safety issues such as furnaces and water heaters installed incorrectly. Similar to weatherization, the voting committee determined if a household can receive rehabilitation services.
4. **Maintenance Classes.** Maintenance classes provide participants with energy conservation tips, and demonstrate common home maintenance practices (i.e., replacing faucets, unclogging drains, etc). The class lasts 3 hours and includes a question and answer session at the end. Participants leave with a packet of information for their reference.
5. **Financial Literacy.** The program offers two venues for financial literacy training: 10-minute workshops provided to WHEAP applicants waiting to be serviced, and a longer, more intense training provided to IFP participants. The longer financial literacy training consists of sessions that instruct households on ways to manage their finances, such as developing a budget, setting up budget billing with their utility companies, opening a

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checking and/or savings account, understanding their credit report, and knowing their rights as consumer.

6. **Tax service.** SDC-offers free tax preparation services and online filing. REACH will work with SDC to provide clients with these services, increasing client household income.
7. **Intensive case management, and referrals to other programs.** All REACH participants should receive intensive case management services, which includes referrals to other programs. Program referrals are intended to improve clients' household and living conditions by increasing care for the family in all aspects of their life.
8. **Referral to first-time homebuyers program.** This service is targeted to participants that are renters. One goal of the program is to assist low-income renters purchase a home. This service facilitates that goal.

Table 4.1 summarizes the specific services offered through REACH and the selection process for each service. Chapter 5 provides the target goals and number of participants for each service.

Table 4.1: REACH Components and Details

Service	Selection Process
Energy House	None – all WHEAP applicants are encouraged to attend
Individual Family Plan (IFP) <i>Base REACH service</i>	Financial eligibility, home in REACH target area, and level of participation. Households that exhibit a need are voted into IFP.
Financial Literacy Training	IFP participants
Abbreviated Financial Literacy Training	None – all WHEAP applicants are encouraged to attend
Energy education	IFP participants (although more will receive through the home visit, even if not elected into the program)
Maintenance classes	IFP participants
Home weatherization (provided through state program)	Homes are given a structural assessment and are assigned a cost of shelter index (cost of housing and energy as a ratio of income) and an expendable income index. The voting committee determines if the service should be provided based on the assessment and index scores.
Home rehabilitation	Same as home weatherization process.
Tax services	None – IFP participants
Referrals to other programs	None – IFP participants
Referral to first-time buyers	Renter participating in IFP with decent credit rating

4.2 THE PROCESS FOR ENROLLING AND BECOMING A REACH MILWAUKEE PARTICIPANT

This section details how a household becomes an REACh Milwaukee participant and receives an IFP.

As noted earlier, most participating households were identified through a walk-through of the Energy House. Case managers contact each person that takes the tour and lives within the target area. The participants, having been introduced to REACh Milwaukee during the Energy House tour, are then reminded of the program and its benefits during the case manager's phone call.

Other means of outreach include:

- Referrals from Energy Assistance representatives
- Referrals from other social service agencies
- Collaboration with Girl Scouts
- Participation in a project service day with local utilities
- Internal promotions of REACh Milwaukee through quarterly journals.

Case managers emphasize to potential participants that this is a *participatory* program. As one case manager noted, participation does not mean picking up a nail and hammer. What it means is they have to take an active role in *learning* about their home, maintenance, and ways to save energy; *putting to practice* what they learned; and *actively following up* on resources they are provided or referred to.

The requirement to participate is imparted on potential clients before they are even accepted into the program. First, case managers collect applicant data electronically using a database that collects very specific household details, such as household members, credit status, household status, employment status, and health issues.

After applying for the program, clients are provided an assignment checklist. This checklist is to be completed before the next appointment – a home visit conducted by case managers. The assignment checklist is fairly comprehensive, and requires the client invest not only time but also money prior to being admitted into the program.

Figure 4.1 details the tasks included on the assignment checklist.

Figure 4.1: Assignment Checklist Provided to Applicants

Please complete this assignment checklist before your next appointment

- Turn down the temperature of your water heater to the warm setting (120 F)
- Check if your water heater has an insulating pipe wrap
- Check and clean or replace the house furnace filter
- Check the age and condition of your refrigerator, kitchen stove, washer and dryer
- Check how many refrigerators are in the house
- Find out where the largest air drafts are in the house
- Look at the type of thermostat present in the house.
- Review how many incandescent lights could be replaced with compact fluorescent lights and replace those lights
- Insulate the water heater
- Use rope caulk or plastic on very leaky windows
- Use dryer for heavy clothes for 20 minutes, then put heavy clothes on the clothing rack to dry completely
- Keep windows, shades, and curtains closed during daytime
- Run air conditioners and fans in the evening
- Start using sweater, slippers and bath robes instead of increasing the home temperature
- Make note of any questions on home energy saving measures to ask SDC Energy House staff at next meeting
- Check smoke alarms and replace batteries/alarms if necessary

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Clients are not penalized if they cannot do something on the list. For example, it might be difficult for them to find the thermostat on the water heater. Case managers understand that these individuals tried to fulfill their part, and let them know they will help them during the home walk-through, which at this point will have been scheduled.

The home walk-through visit with the family is the next step in the application process, and a key step to developing the IFP. The walkthrough allows case managers to 1) verify clients completed the assignment checklist to the best of their abilities, 2) verify information provided in their application, such as the number of people living in a house (*"They're making sure benefits that are installed by REACH are going to families who are going to make the best use of them"*), 3) determine if the home has been weatherized in the past, 4) provide additional energy saving tips based on what they see in the home, and 5) identify any other areas in which a household may need help.

It is after the home walk-through visit that case managers develop an IFP. At this point in the process, case managers identify the needs of the family and resources the family could tap into for additional assistance. For example, unemployed household members are referred to the Job Center, households with children are referred to the lead abatement program and Head Start, and those that have difficulty speaking English are referred to English as a Second Language classes. The case manager then sits down with the family and discusses these needs.

Several weeks after the first home visit, case managers follow up with families to see if they made any progress with their IFP. Progress is not merely contacting the referral provided to them; rather, it is following through, making appointments, and keeping them. Case managers said the rule is to give households three chances to see clients are participating in the program, although they admit to bending this rule: *"We say there's the three chances, but we know there's the fourth then fifth then sixth..."*

A committee votes families into the program. The voting committee consists of five individuals: the REACH Milwaukee program manager, the two case managers, the financial literacy specialist, and a WRAP representative. Based on the application, home visit, and family's participation level, the case manager will decide whether to present the household to the voting committee for formal acceptance into the program.

The committee serves as more than a body to vote people in and out of the program; it is also a group that provides guidance and recommendations on how to best help the people who need it. There are times when it appears a family should not be voted into REACH, or should be disqualified from the program. Most often, this happens when a family refuses to follow through with the program's recommendations or does not participate at the level they should (*"Most families take themselves out of the program"*). The committee provides suggestions on how to get these families to overcome these issues. Oftentimes these suggestions get families back on track, keeping them in the program.

Once in the program, participants remain in the program and are eligible for all program benefits. However, not all participants receive all program benefits.

To-date, no household has "graduated" from the program. At the time of process interviews, REACH staff had not yet thought through what criteria would define a family ready to graduate.

4.3 POTENTIAL BARRIERS TO PARTICIPATION AND SERVICE

REACH Milwaukee staff identified several barriers to participation: level of family involvement required by the program, and participants' conception about program goals. Evaluators further identified three additional potential barriers to program service: REACH staff turnover, weatherization contractor changes, and funding limitations.

A. LEVEL OF FAMILY INVOLVEMENT REQUIRED BY THE PROGRAM

Case managers reported that families are often intimidated by the fact that acceptance into the REACH program requires a commitment from the household to actively participate in the process. Case managers are very clear when describing the program that households will need to be a participant in the process, starting with the checklist. They explain the multitude of benefits the household will enjoy from the program, but the idea of needing to be actively involved, and creating an ownership in the program, deters many potential participants who prefer a program that provides program benefits without requiring anything of them.

B. PARTICIPANTS' CONCEPTION OF PROGRAM GOALS

A second barrier to participation reported by REACH staff is the fact that REACH is not intended to be a weatherization program. Program staff find that REACH participants are looking for weatherization services as well as case management and energy education. In addition, REACH staff report that many households see weatherization as being the true program benefit, and have difficulty seeing energy education, financial counseling, and other benefits offered by REACH as equally important benefits.

REACH staff reported using weatherization as a carrot to get individuals to apply, but this technique can backfire if households do not receive the weatherization referral. Those individuals who are purely looking for a weatherization benefit are referred to the weatherization assistance program, but are advised that the weatherization program will not provide all the other benefits that REACH could provide.

C. REACH STAFF TURN-OVER

Program service may have also been hindered by significant management turnover throughout the past year and a half. From program inception in FY2003 to this interim evaluation report, REACH Milwaukee saw two separate turnovers of program management, and is on the way to see its third. This turnover is a result in changing resource demands at SDC, who reacted by shifting program management.

To this point, all the program managers have been part of the pilot program since the grant award. Therefore, they were all familiar with the program. With that said, there is a certain amount of efficiencies that are lost through changes in management. The day-to-day issues need to be learned and dealt with. Also, as is the case with the current project manager, REACH Milwaukee is not the only program he works with. Needing to devote time to multiple programs means that REACH Milwaukee may not be receiving the attention it needs to react to problems encountered by the program.

The current SDC program manager recognizes that REACH needs a manager more devoted to the program. Due to this recognition, compounded by changes in SDC's responsibilities (specifically their newly awarded responsibility of running part of the weatherization

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assistance program for the Milwaukee area), the REACH Milwaukee program will see a third shift in program management. Evaluators expect this change will be difficult for the program in the short-term, but having a devoted manager may be beneficial in the long-term if the program continues into its third contract year.

In December 2004 SDC lost another key member of their REACH staff – their budget counselor. This individual was also responsible for conducting Spanish Energy House tours. They have not filled this empty position yet, and as a result have not conducted any further budget counseling sessions and the number of Energy House tours has decreased.

Case managers have for the most part remained consistent. This consistency is important as participants come to rely on and trust their case manager. Also, the case managers understand the day-to-day issues, and how to react to these issues because of their constant involvement since program inception.

D. WEATHERIZATION CONTRACTOR CHANGES

The weatherization component of the program also saw setbacks due to contractor changes. The initial REACH Milwaukee work plan called for collaboration with OIC, whom the state of Wisconsin contracted with to provide weatherization services in the City of Milwaukee. At the time of process interviews in August 2004, OIC was not responding to SDC's request to weatherize homes. It was at this point in time when OIC was informed that the weatherization contract was open for re-bid, and they were faced with the strong likelihood that they would not be selected to continue their contract. Additionally, they had a considerable backlog for the weatherization program in general (upwards of 2 years).

OIC's weatherization contract was not renewed at the end of 2004, and two new contractors (SDC and La Casa de Esperanza) are now providing weatherization services. This changeover has naturally delayed weatherization work in the City of Milwaukee as well as within the REACH program, but it appears the new contractors are quickly coming up to speed on work that needs to be accomplished. Additionally, having two contractors serve the REACH target area will increase the program's need to facilitate communication and coordination between the two.

E. FUNDING

The program was designed with the idea that the funds were to be distributed annually at the amount proposed. For example, it was believed that if a total of \$300,000 was awarded, the grant amount would over the course of 3 years equaled \$900,000. As it turns out, this was a misconception and the grant amount awarded is for the total amount of grant as a whole across all 3 years, not for each of 3 years.

In reaction to this news, DOA and SDC have actively attempted to find additional funds to support the program. They have looked to non-federal funding sources including outside organizations and collaborators, the Community Service Block Grant (CSBG), utilities, as well as other resources. At this point, the prospect of additional funding is uncertain.

This funding issue has severely limited the number of participants they will accept into the program. For one, REACH staff reported that the trust applicants put in them is important, especially since this population is not quick to trust. Accepting them into the program and then not being able to follow through with program promises may be more detrimental than

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not accepting any other applicants at all. Also, they are hesitant to promote the weatherization and rehabilitation components of the program without the additional funding, and without those services for enticement recruitment is proving to be difficult.

Evaluators spoke with REACh Milwaukee and DOA staff about their prospects of funding and the program's options with no additional funding. It is uncertain what will happen if no more funding comes through. Staff are committed to doing everything they can to get additional funding and are not yet resigned to the idea that the program will not continue due to funding issues.

5. GOALS AND MOVEMENT TOWARD PERFORMANCE TARGETS

This chapter presents the findings of the outcome evaluation, which reviews program movement toward program goals, interventions, and performance targets.

Table 5.1⁷ details program interventions proposed within the REACH Milwaukee work plan, performance targets, and movement toward those targets. With the exception of the Energy House tours and referrals for weatherization services, the program is behind in their performance target numbers, sometimes significantly.

An intervention that was not completed at all was and negotiating co-payment arrangements with We Energies, the utility in this area. The co-payment intervention was especially important to the REACH program, as this service would move participants toward the goal of making consistent and timely energy bill payments – an important element of creating energy and bill payment self-sufficiency. And while Energy Assistance did provide co-payment and arrearage forgiveness assistance to households within the target zip codes, none of those households were accepted into REACH Milwaukee.

To facilitate co-payment arrangements, REACH Milwaukee staff needs to work within the Energy Assistance program. First, this element of the program is dependent on funding sources provided through Energy Assistance, specifically Public Benefits funds. Second, Energy Assistance staff have access to the system that would facilitate co-payment arrangements with the utility.

Moving forward, evaluators suggest REACH Milwaukee staff identify other ways to incorporate co-payment arrangements into the program by either working with Energy Assistance or obtaining access to the Energy Assistance system so they can coordinate these arrangements themselves.

⁷ Table 5.1 provides the number of households specifically participating in REACH Milwaukee, and with the exception of Energy Assistance and Energy House tours does not include households that received services through general referrals by SDC-Milwaukee. For example, the agency established co-payment arrangements or arrearage forgiveness plans, provided tax assistance, and provided financial training to numerous households within the targeted area (180 households, 643 households, and 116 households, respectively). These numbers are not represented in the table because these households did not receive these services as a result of REACH Milwaukee efforts.

Table 5.1: Interventions, Milestones, and Current Participation Numbers

Intervention	Milestone	Actual participation numbers (Contract-to-date)
Participants accepted into program	300	96
Provide online Energy Assistance applications	4,000 annually	6,566 ⁸
Negotiate with the local utility company for payment of arrearages including co-payment arrangements	300	0
Instruct clients and family members on energy conservation at Energy House	2,200 clients visit the Energy House, 1,500 become aware ⁹ of energy saving techniques	1,874 visitors
Provide home maintenance training	250 participate, and 150 exhibit proficiency	17 participants
Provide financial literacy instruction, and clients create and understand their personal financial plan	300 participate in classes, 150 understand their financial situation, and 75 maintain full and timely bill payments	19 participants
Provide supplemental case management	300 meet with case manager, 150 decrease expenses, and 75 maintain positive cash flow	96 participants
Provide home rehabilitation support	30	6 homes referred for rehabilitated
Assist clients in claiming appropriate tax credits through free tax services	250	0
Provide home buying counseling	50 clients pursue counseling opportunities, and 30 clients pre-qualify for home mortgages	7 participants
Assist clients in improving environment through weatherization benefits	30	30 homes referred for weatherization

Evaluators believe Wisconsin's program design was aggressive. However, it must also be recognized that their plan was developed under the assumption that the budget would be approximately \$1.2 million over the course of the three-year program, compared to an actual budget of \$425,000.

⁸ This number represents households in this target area that received Energy Assistance through SDC-Milwaukee from May through September 30, 2004.

⁹ It is important to note the distinction of assessing awareness versus understanding of energy conservation techniques. Future evaluation activities will review the accomplishments of the Energy House in terms of this distinction by focusing on not only awareness but also retention and application.

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A review of Wisconsin's program targets in comparison to other states' proposals and budgets provides additional context to offerings in comparison to budget levels. Other state programs, especially those with lower funding levels, tend to offer very targeted services under their REACH funding. For example, states may only offer weatherization services, or energy efficiency toolkits, or energy conservation classes. States that offer a more holistic approach to the program tend to be awarded grants of approximately \$1 Million and higher. For example:

- **Arizona** took a holistic approach to their program design, attempting to increase participants' self-sufficiency in general by reducing energy costs, increasing income, and reducing energy usage. However, Arizona's budget included LIHEAP funds, and totaled over \$2 Million.
- **The District of Columbia** also offered services beyond energy services to participants. For example, their proposal included a home ownership program to help low-income households qualify for home ownership. Their overall goal, however, hovered more around energy efficiency education and reducing energy costs than case management. The District of Columbia's grant amount was \$1.1 Million.
- **Kentucky's** program also resembles Wisconsin's program in the sense that it claims to offer households intensive case management services as well as provide home repairs and weatherization services. Their performance target was 50 participants attaining self-sufficiency across the 3-year program and an additional 50 participants reaching a level of stability in their life circumstances. This particular grant amounted to approximately \$995,000.

Appendix B includes a table that summarizes states' proposed plans over the past few years and their budgets.

5.1 PROGRAM GOALS, INTERVENTIONS, AND RESULTS

This section summarizes the program goals and interventions as detailed in the REACH Milwaukee proposal and work plan. It also presents results, or movement toward these goals, in context of the participant and nonparticipant surveys.

5.1.1 Goal 1: Clients make consistent and timely energy bill payments

INTERVENTION 1:

Provide online Energy Assistance application for 4,000 client households annually. This intervention would lead to decreased out-of-pocket costs.

Evaluation findings:

REACH Milwaukee did not make any progress toward this intervention. The program is using the platform of the Energy Assistance Program, and those applicants, to enlist participants. As a result, most if not all participants in REACH are receiving Energy Assistance, as well as many others within the target area. However, these individuals are not receiving assistance as a result of the REACH program; rather, it is the efforts of the Energy Assistance program that is providing services to these clients.

Evaluators believe this intervention for the REACH program is not feasible given the administrative limitations (i.e., funding levels and staffing) and the fact that Milwaukee already has an established system for accepting and processing Energy Assistance applications.

INTERVENTION 2:

Negotiate with the local utility company for payment of arrearages including co-payment arrangements. As a result, client would remain connected to utilities and establish regular payment histories.

Evaluation findings:

As noted earlier, no households were placed on a co-payment arrangement due to program perceptions of the need to work through Energy Assistance's crisis component. Not being able to implement this service in the program is unfortunate, as REACH participants could benefit from their utility involvement in a co-payment arrangement.

REACH participants report that they have difficulty meeting their energy expenses. About three-quarters of REACH participants said they sometimes or often did not have enough money to pay even part of their energy bill when it came due. Additionally, only 18% of participants said they are able to pay the full amount of their energy bill often, and a third currently owe money for previous months' energy bills.

This information helps to explain why nearly 12% of REACH participants said had their fuel shut-off or experienced a disconnect for lack of payment in the 2 years prior to participating in REACH. Program participation does not appear to have an affect on households' ability to pay their energy bills; since participation, this number was insignificantly decreased to 11% (Table 5.2).

A comparison with non-respondents' energy payment behaviors show that the program is reaching households with high need. REACH participants exhibit similar payment abilities as the nonparticipant population in all areas with the exception of disconnects, for which participants have a lower incidence. This difference could be in part explained by the fact that REACH participants by nature may actively seek ways to avoid disconnects. REACH, being a participatory program, most likely enlists households that are more aware, concerned, and involved in their household energy use and bill payment issues.

Table 5.2: Bill Payment Behaviors for REACH Participants and Nonparticipants

	REACH Participants (n=50)	REACH Nonparticipants (n=211)
In the past 12 months, did not have enough money to pay even <i>part</i> of the energy bill when it came due	Often true: 35% Sometimes true: 39% Rarely true: 26%	Often true: 37% Sometimes true: 33% Rarely true: 30%
In the past 12 months, did not have enough money to pay the <i>full amount</i> of the bill when it came due	Often true: 54% Sometimes true: 28% Rarely true: 18%	Often true: 52% Sometimes true: 25% Rarely true: 22%
Experienced a fuel shut-off or energy disconnect in past 2 years because payments were late	12% (decreased to 11% after participation in REACH)	28%
Currently owe for previous months' energy bills	34% (averaging \$784)	37% (averaging \$966)

5.1.2 Goal 2: Clients decrease energy consumption

INTERVENTION 3:

Instruct clients and family members on energy conservation at the Energy House. As a result, clients learn how to decrease energy expenditures, and household energy consumption would decrease from first year of REACH to second year of REACH.

Evaluation findings:

A survey of Energy House participants and REACH participant surveys indicate that not only is the program teaching households how to ways to save energy, but some of what is being taught is also being applied within their homes. Data is currently being collected to measure a decrease in energy use, and will be included in the final evaluation report (scheduled for after pilot completion in 2006).

Table 5.3 details the percent of Energy House participants that report seeing specific energy saving activities through the Energy House, and the percent that first learned of the activity through the Energy House. A high percent of respondents reported seeing all energy saving activities. Respondents were least likely to report seeing information about moving furniture away from vents and looking for air leaks in general.

The Energy House survey asked respondents if the tour was the first time they heard of an activity. A majority of respondents claimed they knew of the activity prior to the tour. This information could have been initially disseminated through sources such as the Energy Assistance application process (some representatives discuss energy saving activities during the application process) or utility brochures. About a quarter of respondents reported the tour taught them about changing the furnace filter, and about a fifth of respondents first learned of replacing CFLs, using curtains to regulate the home temperature, moving furniture, and blocking leaky drafts through the Energy House tour.

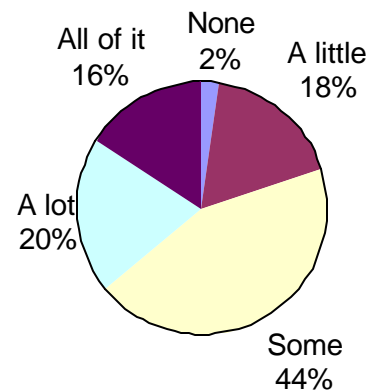
Respondents that completed the Energy House survey were asked how much of what they learned in the Energy House they thought they could do in their home, and if they believed they would save money following the advice provided. Most respondents believed they could apply a lot of all of what was discussed in their home (79%). Only 1 respondent said “none.” Additionally, 88% of respondents felt they would save money if they followed the advice of the Energy House.

Participant surveys indicate that the Energy House did actually encourage changes, and that these changes had positive effects on their comfort and energy bill. Nearly all REACH participants surveyed that toured the Energy House said they did at least some of what they learned in the Energy House, and an 16 percent said “all of it.” The most commonly reported changes made were replacing incandescent light bulbs with CFLs and sealing up leaky windows with rope caulk or plastic (62% and 67%, respectively). Only 14% reported reducing their thermostat to reduce energy costs.

Almost three-quarters of these respondents felt their home is more comfortable, and over half believed their bills are lower as a result of the changes they made (70% and 54%, respectively). Forty-four percent of participants believed their energy bill did not change.

It is important to note that REACH participants, as part of their application process, are required to take energy saving measures such as installing CFLs. The fact that 67% of REACH participants that toured the Energy House said they replaced their light bulbs with CFLs does not indicate that 67% of individuals who toured the Energy House did the same. In other words, this information cannot be extrapolated to the population of Energy House participants in general.

Figure 5.1: How much of what respondents learned in the Energy House was applied in home? (N=73)



Source: REACH Participant Survey.

Table 5.3: Percentage of Energy House Participants that Heard of Energy Saving Activity, and First Learned of Activity, Through the Energy House

Energy Saving Activity	% of individuals that toured Energy House heard of activity	% of Energy House survey respondents that heard, and first learned, of activity through tour	% of what REACH participants heard was applied in house*
Replacing incandescent light bulbs with energy saving compact fluorescent light bulbs	100%	19%	62%
Purchasing energy efficient or ENERGY STAR® appliances when replacing older appliances	95%	16%	7%
Using programmable thermostats to control heat and cooling costs	97%	14%	14%
Using cold water for laundry	91%	15%	0%
Installing aerators on bathroom faucets	93%	11%	14%
Replacing showerheads with low-flow shower heads	95%	10%	2%
Replacing large toilet tank with smaller one, or inserting a "Tank Bank" in tank	92%	10%	10%
Using curtains to block drafts in the winter and keep heat out in the summer	99%	20%	17%
Moving furniture away from vents	81%	19%	2%
Lowering water heater temperature to 120° F	97%	13%	12%
Changing the furnace filter regularly to improve furnace performance	96%	23%	14%
Insulating water heater and pipes	95%	14%	14%
Sealing up leaky windows with rope caulk or plastic to avoid drafts	97%	15%	67%
Installing weather strips on doors to block drafts	95%	19%	17%
Looking for air leaks in other areas, such as baseboards and kitchen cabinets	71%	6%	12%

Source: REACH Participant Survey and Energy House Survey.

* NOTE: participants were asked top-of-mind what they applied, and were not prompted by interviewer.

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INTERVENTION 4:

Provide appliance/fixture maintenance information and training to clients. Clients will learn basic maintenance and appliance repair techniques and maintain at least one energy saving device on an on-going basis at home.

Evaluation findings:

REACH staff reported that only 17 out of 88 participants attended the home maintenance class. The initial plan called for nearly all participants to attend. According to the REACH program manager, home maintenance classes were held several times at the onset of the project. However, time and resource constraints hindered the instructor's ability to hold as many sessions as they would have liked.

This intervention appears to have accomplished its goal of teaching individuals basic maintenance skills for those who participated in the class; overall, home maintenance class participants were satisfied with the training, felt information presented was useful, and used what they learned. Participant satisfaction with these classes averaged 4.5 on a 1 to 5 scale, where 1 is not at all satisfied and 5 is very satisfied. Additionally, all respondents said the training was either somewhat or very useful, and 87% used the information presented in class to make improvements in their homes. Whether the classes moved clients toward the ultimate goal of saving energy, however, was not apparent.

5.1.3 Goal 3: Clients improve financial literacy

INTERVENTION 5:

Provide financial literacy instruction for client households to enable clients to understand their financial plan, maintain full and timely utility bill payments, and experience no disconnections within one year.

Evaluation findings:

It is unclear whether or not this intervention has accomplished what it set out to do. REACH Milwaukee staff reported providing financial literacy training to 19 participants. Those who did report participating in the financial literacy instruction believe they will be able to improve their finances based on information presented in the class, but only half had done anything different at the time they were interviewed.

Financial literacy training was divided into sessions: budgeting techniques and tips; opening a checking and/or savings account; managing credit cards; monthly budget billing for utilities; saving or investing money; understanding credit reports; rights and responsibilities as a consumer, and purchasing a home. Respondents most commonly reported that the course they attended discussed budget tips and techniques, followed by opening a checking or savings account and establishing a budget billing arrangement with utilities (Table 5.4).

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Table 5.4: Financial Literacy Training Sessions (n=21)

Session	Percent reporting information was provided
Budgeting techniques and tips	92%
Opening a checking and/or savings account	87%
Managing and using credit cards	83%
Monthly budget billing for utilities	87%
Saving or investing money	83%
Understanding credit reports	70%
Rights and responsibilities as a consumer	69%
Purchasing a home	72%

Source: REACh Participant Surveys.

Many respondents felt they would be able to improve their household finances based on information provided; however, 56% have not made any changes since taking this financial class. Those who did make changes said they set up a budget, are attempting to manage and pay off their credit cards regularly, or opened a checking or savings account. One respondent refinanced the home mortgaged in response to the information provided.

Respondent satisfaction for the financial literacy training averaged 3.9 on a 1 to 5 scale, where 1 is not at all satisfied and 5 is very satisfied. Reasons for dissatisfaction included: information provided did not pertain to them, and respondent would have preferred a one-on-one counseling.

Financial literacy training does not seem to have had an effect on participants' ability to make regular and timely bill payments (see Intervention 2 for more details on this issue). In addition, no respondents reported setting up a monthly budget billing arrangement with their utilities in response to information provided in this class.

The second wave of the participant surveys (scheduled for 2006) may provide more insight into the effectiveness of financial literacy classes in accomplishing the goal of improving clients' financial literacy and bill payment behaviors. Utility data will also be used to supplement the next wave of survey efforts..

5.1.4 Goal 4: Clients improve overall housing and living conditions

INTERVENTION 6:

Provide clients with supplemental intensive case management in a holistic approach to meet the overall needs of the household. Case management involves referrals to other social service programs, which would in effect decrease out-of-pocket expenditures and help clients maintain positive cash flow.

Evaluation findings:

Intensive case management was described to evaluators as one of the most important components of the program. It is through this case management that family plans are established, and staff monitor participants' movement toward both energy and general living

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self-sufficiency. Case managers review participants' individual situations and refer clients to other agencies if they feel a need is there.

Again, it is not clear from customer survey results whether the goal of this intervention was accomplished. Only 30% of respondents said they received referrals to other organizations or programs. The organizations and programs they were referred to varied significantly by respondent and included: the weatherization assistance program; JOBS, Neighborhood Housing Services; Childhood Lead Protection program; WIC, Medicaid; Food Stamp program; and Head Start. Qualitatively, respondents noted following up with these referrals about half the time, and overall felt the referrals were somewhat useful.

INTERVENTION 7:

Provide clients with home rehabilitation and weatherization support, improving health and safety, and overall conditions of the home.

Evaluation findings:

Twenty-eight percent of the participants interviewed said they received home rehabilitation or weatherization services. Of these, less than half said that work was completed. As discussed in the previous chapter, there was a switchover in weatherization contractors within FY2004. This switchover delayed weatherization services in the Milwaukee area, which explains why such a high percent of REACH participants were still in the process of receiving benefits at the time of the interview.

Given the small number of respondents for whom work was completed (6), it is not possible to state with confidence what affect this intervention is having on improving the health, safety, and conditions of the home. The panel nature of the survey methodology will allow evaluators to follow up with the individuals that received services in a year's time to get a better sense of the program's impact in this area.

Qualitatively, however, it appears the program could be making some progress toward the goal of improving households' living conditions. A review of home conditions before weatherization and after weatherization shows that there was some improvement reported for each household condition, the greatest improvement being in the heating system (Table 5.5)

REACH Milwaukee staff report they have a system of accepting households into the weatherization element of the program, and one criteria is household conditions. As qualitative as the data is at this point, it does not appear there is any significant difference in household conditions between those who received weatherization benefits and those who did not.

With that said, it appears that the program is, in general, targeting households with poorer conditions than the nonparticipant population. Given the small number of cases, there is little to no statistically significant difference between the conditions of those weatherized and those not weatherized and nonparticipants. However, we present Table 5.5 to further characterize the participant and nonparticipant population by household conditions and show, qualitatively, the differences reported by those who did and did not receive weatherization services.

Table 5.5: Household Conditions Experienced by REACH Participants that Were Weatherized, Not Weatherized, and REACH Nonparticipants

Condition	Prior to weatherization (n=6)	After weatherization (n=6)	Non-weatherized participants (n=44)	Nonparticipants (n=214)
Notice drafts*	83%	67%	86%	69%
Some rooms colder than others in the winter**	100%	67%	93%	83%
Mold or mildew in home	33%	17%	37%	26%
Problems with heating system**	67%	0%	40%	26%
Problems with water heater	33%	0%	23%	17%
Some appliances not working properly*	50%	17%	48%	31%
Notice gas leaks	0%	0%	21%	12%
Roof in need of repair or replacement*	83%	83%	48%	27%

(NOTE: Number of cases for whom weatherization was complete is small (6) and should be reviewed qualitatively.)

* differences between participants without weatherization services and nonparticipants significant at the 95 percent confidence level.

** differences between participants without weatherization services and nonparticipants significant at the 90 percent confidence level.

Source: REACH participant and nonparticipant surveys.

5.1.5 Goal 5: Clients build assets

INTERVENTION 8:

Assist clients in claiming all appropriate tax credits through free tax service, increasing households' income.

Evaluation findings:

REACH staff was unable to report the number of households that received free tax service, and in fact only 2 REACH participant respondents said they received free tax service through the program. Although one respondent said the service provided a greater refund or had to pay less into taxes, at the point of this interim report the goal of assisting clients to build assets was not met.

INTERVENTION 9:

Provide home buying counseling to REACH Milwaukee client households, educating renters on the home buying process, pre-qualifying renters for mortgages, and facilitating the purchase of their first home.

Evaluation findings:

Less than a quarter of REACH participants are renters. Of those households, only 7 received home buying counseling, and no one has purchased a home yet.

5. Goals and Movement Toward Performance Targets...

The intervention stated that 30 clients will pre-qualify for home mortgages and purchase their first home in 12 months. Evaluators believe this target will be very difficult to achieve.

INTERVENTION 10:

Assist clients in improving environment and equity in home through assistance from REACH Milwaukee and weatherization services.

Evaluation findings:

There is not enough information for evaluators to determine if the program is building client assets through weatherization services. Results related to weatherization services are discussed within Intervention 7.

6. PROCESS ISSUES FOR FURTHER EXPLORATION

At the middle of the second year of the program, REACH should be beyond the construction stage and running smoother. REACH staff need to continue to react to difficulties with program goals in mind. Additionally, with essentially only 3 individuals recruiting participants, managing clients' participation levels, and delivering Energy House tours, and further streamlining the process will become essential.

So far, REACH personnel have been able to keep up with demand. However, the number of participants is significantly short of where they saw themselves being at this point in the program. If the program is to continue and attempt to reach the number of participants anticipated, then REACH program managers will need to consider how to provide such a high level of service to all participants with the staff available to them. One question moving forward is how case managers will manage the increased workload resulting from more participants, as well as continue to recruit and conduct Energy House tours. To-date, there is no plan of action.

Evaluators believe that providing REACH Milwaukee staff electronic access to the Energy Assistance database system can further strengthen case management capabilities. Currently, REACH Milwaukee collects household information separate from Energy Assistance and maintains that information in its own database. The only way the programs can see what types of assistance clients receive is to communicate directly. Establishing an electronic link between Energy Assistance would allow case managers to view, in an accurate and timely fashion, what services their clients are receiving and how they be better served.

Evaluations of other pilot programs that establish electronic links between programs show that connections between programs improve case management opportunities, timeliness and accuracy. The Milwaukee Energy Linkage is one such program. This pilot established electric links between SDC-Milwaukee and the Wisconsin Gas billing system and expanded case management and bill payment services. The evaluation reported that, as a result of this linkage, case managers felt they were able to serve their clients better, could follow their clients' financial and bill payment patterns more effectively, and that the quality of their work was much improved. The evaluation also found that the pilot alleviated some communication problems between the two organizations. Evaluators believe an electronic link between REACH Milwaukee and Energy Assistance could reap similar rewards¹⁰.

Another question looking toward the future of the program is what will constitute "graduating" from the program. REACH participants have not gotten to the point yet where program and case managers feel they are ready to graduate from the program. However, criteria are not yet identified that would help determine if and when a family will graduate. This is another issue the program is considering.

¹⁰ Tannenbaum, Bobbi, Richard Hasselman, Scott Pigg, and Kathy Kuntz. *Exploring Low-Income Program Alternatives: An Evaluation of Six Wisconsin Energy Bureau Pilots*. Energy Center of Wisconsin, September 1999.

APPENDIX A: STATES' REACH PROGRAM SUMMARIES

This appendix summarizes REACH program proposals, as presented by U.S. Department of Health and Human Services, Administration for Children and Families.¹¹

¹¹ <http://www.liheapch.acf.hhs.gov/>

Table A.1: REACh Program Descriptions for Select States' Proposals

State (Award Year to End Date)	Program components and goals	Target number of participants	Funding
Alabama (2003–2006)	Clients receive an assessment of estimated energy usage, a home energy audit; and a family needs assessment. This assessment determines which energy conservation measures should be initiated along with participation in energy education classes.	Not mentioned	\$1,000,000
Arizona (1998–2001)	The Arizona REACh program developed and used scales to assess the level of self-sufficiency for a household 15 service areas (including energy assistance, energy efficiency, energy management practices, income, employment, health care, language and literacy, adult education, shelter, childcare, food and nutrition, support network, family relations, transportation and mobility and community involvement), and to track changes in self-sufficiency over time. The case managers recorded the levels of self-sufficiency based on their assessment of the household. The assessments were made at intake, referral, follow up, and close out. The range of the self-sufficiency scales was from 1 to 5, with each level defined as follows: 1) in crisis, 2) vulnerable, 3) stable, 4) building capacity, and 5) empowered. A household was not considered to be self-sufficient in a given service area until the household reached a level of 5.	Not mentioned	\$2,897,000
Connecticut (2003–2006)	Demonstrate the effectiveness of using behavioral change and community collaboration to reduce the energy burden of low-income households. Utilizes a dual approach focusing on 1) client services to change behaviors of participating households and 2) landlord and community involvement to engage community stakeholders in supporting increased energy efficiency. Program proposes to provide comprehensive case management, energy and financial education services, energy audits, and landlord outreach and education to increase economic self-sufficiency of participating households through increased energy efficiency in the home.	300	\$392,245

State (Award Year to End Date)	Program components and goals	Target number of participants	Funding
District of Columbia (2001–2004)	Program took a holistic approach to helping low-income households become more energy self-sufficient through five interrelated programs: 1) energy aggregation; 2) education and outreach; 2) home affordability program; 4) home ownership program; and 5) development of new affordability programs under District's new public benefits program. These five programs will help make energy more affordable for customers, and help them stay in their rental home, maintain home ownership, or purchase a home.	Not mentioned	\$1,100,000
Georgia (2002–2004)	Goals include reducing household energy burden; increasing regularity of energy payments; and increasing energy suppliers' contributions to the goal of reducing household energy burden. Project services include Energy Efficiency Education workshops, mediation with energy providers to reduce arrearages and establish reasonable payment plans, modified "weatherization" of housing units, supportive relationships with Energy Advocates to address barriers to energy self-sufficiency (including counseling in financial literacy and manageable budgeting), and referrals to other appropriate services that may reduce their expenditures or increase their usable income.	300 participants	\$1,100,000
Illinois (1998–2000)	Improve the quality of life for elderly homeowners through energy usage analysis, comprehensive weatherization (\$3,400 per home), household counseling and home visits, and budget management counseling.	60 participants	\$166,667
Indiana (1998–2000)	Program's main goals was to offer assistance toward the objectives of housing, energy, environment, social, and economic stability. The Indiana REACh coordinated a number of services, including support services, health services, budget and housing counseling, energy education, identification of barriers to self-sufficiency, and referrals and follow-up to the appropriate agencies for counseling.	240 participants	\$1,510,840

State (Award Year to End Date)	Program components and goals	Target number of participants	Funding
Iowa (1999–2000)	The goal of the program was to increase the sustainability of residential energy costs for low-income households. The program delivered a package of services to participants; including: 1) risk assessment and identification; 2) energy use information; 3) goal setting assistance; 4) family budgeting assistance; and 5) energy efficiency investments. Field staff to conducted home visits with participant households to investigate household energy use, sources of income, and budget strategies to help meet household living needs. The project also called for energy audits to assess the potential for improving the thermal integrity of the participants' homes.	Not mentioned	\$372,391
Kentucky (2001–2003)	Move clients toward self-sufficiency and, for some, toward a level of stability in their life circumstances. Provide energy repairs, extensive weatherization services, energy education, household budget counseling, and intensive holistic case management services	150	\$994,998
Maine (2001)	Reduce household energy burden by reducing electric costs. Target two groups: elderly, renting households who receive home energy audits, appliance repair and replacement services, and other energy reducing measures. The second group are homeowners who receive solar heated domestic hot water systems.	350 renters 11 homeowners	\$700,000
Maine (2002–2004)	Deliver a three-tiered intervention model, consisting of: 1) Provision of energy conservation education, 2) Home audits to target population households, 3) The provision of Energy Use Reduction Measures, to include Replacement of Electric Hot Water tank with a special design Nyletherm heat pump water heater, Weatherization Kits, fluorescent lighting, and an including Energy Efficient Education Service Plan (EEESP).	120	\$900,000
Maryland (1997–1998)	Help clients reduce their energy bill, improve their budgeting skills, and improve their education and/or occupational opportunities through case management and low-cost weatherization measures. Case management includes: financial assistance, referrals to other services, and money management and budget counseling.	Not mentioned	\$169,178

State (Award Year to End Date)	Program components and goals	Target number of participants	Funding
Massachusetts (2002–2004)	<p>Program proposed to build long-term gains in self-sufficiency for approximately 900 client households during the 3-year course of the program through:</p> <ol style="list-style-type: none"> 1) Intensive, “one-stop shop” case management 2) Arrearage forgiveness arrangements through utilities in return for engagement in a comprehensive literacy training. 3) Expansion of access to benefits and resources which can stabilize families and household budgets. Access a range of housing and social service resources to reduce household energy burdens. 4) Financial Literacy and Asset-Development Programs 	900	\$1,000,000
Mississippi (2003–2005)	Help households reduce their energy consumption through an energy assessment, energy education, energy audits, and a family needs assessment which determines which measures should be initiated along with participation in energy education classes.	Not mentioned	\$1,100,000
Nebraska (1996–1998)	In an effort to promote energy self-sufficiency, this program offers to clients 1) an in-home energy audit by an energy management specialist; 2) workshop instruction in five areas related to energy efficiency and finances; 3) on-going case management individually tailored based on the results of the energy audit and the LAP family assessment, and 4) basic home weatherization supplies for participant installation. The program also provided vouchers toward utility bills to participants and nonparticipants for completion of program elements.	600 participants (200 of which would drop out and become nonparticipants)	\$600,000

State (Award Year to End Date)	Program components and goals	Target number of participants	Funding
Pennsylvania (2003–2005)	Lower client energy costs by expanding its Cool Homes program a targeted area to receive white roof coating. This roof coating provides passive cooling in hot summer weather, thereby reducing both air conditioning use and cost and preserves the roof and extends its life, on average by ten years. The program will leverage all other energy conservation and home repair services for these clients in order to maximize the energy savings they experience, including the Weatherization Assistance Program, and the utility-funded gas, electricity and water conservation programs.	300 participants	\$405,855
Rhode Island (2002–2004)	Interventions include: energy efficiency education and resource education; energy crisis assistance; energy conservation services; more intensive energy education carried out through caseworkers of collaborating programs, applying a focused holistic family development model; and Impacting the individual families by developing group participation and leadership skills in working towards energy self-sufficiency.	Not mentioned	\$1,100,000
Virginia (2002–2004)	Energy educators follow-up regular weatherization services with an in-house client meeting. Energy Educators review the purpose and expected outcomes of weatherization, and work with the clients to identify other energy-efficient measures the client can begin using to further reduce their home's energy consumption. Funds are also used to collect and analyze pre- and post-weatherization energy consumption data to determine the benefit-to-savings ratio.	2,862 households receive energy education, and 316 homes monitored for impact analysis	\$1,000,000

APPENDIX B: DATA COLLECTION INSTRUMENTS

B.1 PROCESS INTERVIEW PROTOCOL FOR REACH MILWAUKEE AND DOA STAFF

Data collection instrument begins on next page.

**REACH Milwaukee
Program Implementer Interview Protocol**

To be completed with REACH Milwaukee director and case managers as appropriate

Interview Objectives:

- Characterize REACH Milwaukee operations and identify Individual Family Plan (IFP) enrollment practices.
- Gather specific process information for REACH Milwaukee
- Identify issues that should be incorporated into the evaluation planning process and customer survey instruments

I. Introduction

Explain purpose of evaluation and assure confidentiality of interview.

II. REACH Milwaukee Implementation

First, I would like to get an understanding of how REACH Milwaukee is operating at SDC.

1. Could you please explain to me the type of services you offer customers as part of REACH Milwaukee?

Probe specifically about:

- Energy conservation training
 - Financial planning
 - Utility co-payments
 - Home buying support
 - Home rehabilitation (NOTE: disagreement about where rehab funds come from, REACH or WRAP)
 - Tax support (mentioned at start-up meeting and in proposal, but not within logic model).
2. Describe to me any services you consider to be new or innovative. Has the program experienced any difficulties implementing these new or innovative techniques?
 3. What components of the program did you initially implement, and then revise to account for difficulties? What difficulties were there, and how was the program revised to account for them?

4. Explain the benefits provided to households under the REACH grant (current understanding: IFP households and those that walk through Energy House. Is there another segment that receives services? Are only IFP households eligible for benefits as outlined in the proposal, or is there another segment eligible for benefits?)
5. How many people are involved in implementing REACH Milwaukee at SDC and what are their roles?
6. How are REACH Milwaukee participants and activities tracked in your information system? (See if you can see report or program tracking system).
7. Who all do you work with in implementing REACH Milwaukee (Probe for range of market actors: DOA, We Energies, Milwaukee WRAP, other agencies?)

(Note: Review program logic model at end of interview to refine logic model and understanding of program operations. Wait to review until end of interview to see how actual implementation compares to proposed activities).

III. REACH Milwaukee Enrollment

8. How do you encourage others to go through the Energy House? Describe the process of conducting the Energy House tours. (Probe: how many go through the tour at a given time, how to determine what type of information is distributed, any materials provided following the tour, etc).
9. Who do you target to participate in the Individual Family Plan? How do you identify these households? (Probe about any specific targeting based on vulnerable household members, high energy consumption, etc.)
10. Have you encountered any difficulties recruiting IFP households? How are you overcoming these barriers?
11. How many households are currently signed up as IFP households?
12. Have there been any households that signed up, but have since dropped out? What percent? What are the reasons these households are dropping out? Will the program need to account for these drop-outs and still get the numbers as proposed for the funding?
13. What difficulties have you encountered in enrolling rental units (probe specifically about any landlord issues)?
14. What are the demographic characteristics of those participating in the IFP? Is there any concern about not serving certain segments of the population?
15. What other methods do you use to promote households participating in services offered through REACH Milwaukee?

IV. Next, I would like to get a sense of your opinion of how REACh Milwaukee is functioning.

16. How do you think REACh Milwaukee is affecting clients':

- energy conservation knowledge and attitudes
- energy consumption
- financial literacy
- asset acquirement
- utility bill payment behavior
- overall housing and living conditions.

17. What type of feedback have you received about the Energy House? Have you had clients return to provide feedback about any changes they have made as a result of the tour they took?

18. Do you feel the goals of the program are being achieved (have goals in-hand to refer to)? What are the barriers to achieving these goals?

19. Have you encountered or are you encountering any specific difficulties with working with any of the groups we discussed above? Explain any difficulties.

20. Have you encountered or are you encountering any difficulties in the service delivery process? Explain any difficulties.

21. What REACh Milwaukee program component do you think is working best and why?

22. What REACh Milwaukee program component do you think is most in need of improvement and why?

23. Are there any other program delivery mechanisms you think should be explored?

24. Are there any state or federal regulations that hamper your ability to provide this program to the people who need it?

Finally, I would like to discuss the evaluation process with you. (Explain purpose of evaluation again and type of data planned on being collected.)

25. What additional issues would you like to see the evaluation address?
26. What data would you like to see the evaluation collect?
27. Discuss the evaluation data needs with most relevant party (most likely John). Outline the type of information we will need for the customer survey and utility arrearage data request and the timeline for getting the information we need. Agree on a process for making the data request and receiving the data in a timely manner.
28. Review draft program logic model. Discuss the differences between the draft logic model and proposal, and determine if one should be revised.

B.2 ENERGY HOUSE SURVEY (ENGLISH)**Thank you for taking the tour of the Energy House!**

We would like to hear about your experiences with the Energy House. Please complete the brief questionnaire below. Information you provide will help us understand what was useful to you, and what we can do to make the Energy House a better experience.

All your information will remain confidential. The questionnaires will be sent directly to PA Consulting Group, an independent company, to be entered and reviewed. If you have any questions about this survey, please ask your Home Energy Plus (Wisconsin Home Energy Assistance Program - WHEAP) representative. Or you can contact Laura Schauer at PA Consulting Group directly at 1-800-935-4277 with any questions.

Thank you for your help in advance!

⇒⇒⇒⇒⇒⇒⇒⇒⇒⇒ CONTINUE TO QUESTIONNAIRE ⇒⇒⇒⇒⇒⇒⇒⇒⇒⇒

1. Was this the first time you've gone through the Energy House?
 - 1 ☐ Yes
 - 2 ☐ No, I've toured it before

2. How many other people in your household have toured the Energy House?
 - 1 ☐ None
 - 2 ☐ 1 or 2
 - 3 ☐ 3 or more
 - 4 ☐ Don't know

3. What prompted you to enter the Energy House? (CHECK ALL THAT APPLY)
 - 1 ☐ I was waiting to be seen by an Energy Assistance representative
 - 2 ☐ Thought it would be interesting to see what was in the house
 - 3 ☐ Heard about the tour from family/friends/neighbors/relatives
 - 4 ☐ Wanted to receive compact fluorescent light bulbs
 - 5 ☐ Other: _____

4a. The Energy House demonstrates energy saving activities that can help you save energy all year long. Below, we have listed 14 activities that you might have seen at the Energy House. In Column A, please tell us if you saw or heard of the energy-saving activity in the Energy House tour. In Column B, tell us if the first time you heard of the energy-saving activity was through the Energy House tour.

Energy saving activity	Column A: <i>Did you see or hear about activity at Energy House?</i>	Column B: <i>Was the Energy House tour the first time you had heard about the activity?</i>
1 Replacing incandescent light bulbs with energy saving compact fluorescent light bulbs	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
2 Purchasing energy efficient or ENERGY STAR® appliances when replacing older appliances	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
3 Using programmable thermostats to control heat and cooling costs	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
4 Using cold water for laundry	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
5 Installing aerators on bathroom faucets	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
6 Replacing showerheads with low-flow shower heads	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
7 Replacing large toilet tank with smaller one, or inserting a "Tank Bank" in tank	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
8 Using curtains to block drafts in the winter and keep heat out in the summer	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
9 Moving furniture away from vents	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
10 Lowering water heater temperature to 120° F	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
11 Changing the furnace filter regularly to improve furnace performance	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
12 Insulating water heater and pipes	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
13 Sealing up leaky windows with rope caulk or plastic to avoid drafts	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
14 Installing weather strips on doors to block drafts	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
15 Looking for air leaks in other areas, such as baseboards and kitchen cabinets	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

4b. Did you learn any other new ways to save energy in the Energy House?

1 ☐ Yes → What? _____

2 ☐ No

5. How much of what you learned about in the Energy House do you think you can do in your home? (CHECK ONE)
- 1 ☐ None
- 2 ☐ A little
- 3 ☐ Some
- 4 ☐ A lot
- 5 ☐ All of it
6. Do you believe you would save money if you followed the advice of the Energy House? (CHECK ONE)
- 1 ☐ No, because I do all these things already
- 2 ☐ No, because my house is in such poor shape nothing will help
- 3 ☐ No, because [tell us why not: _____]
- 4 ☐ Maybe
- 5 ☐ Yes, a little
- 6 ☐ Yes, a lot
7. What did you like best about the Energy House?
- _____
- _____
8. What would you like the Energy House to improve?
- _____
- _____
9. Do you plan to tell anyone about your experience at the Energy House?
- 1 ☐ Yes
- 2 ☐ No

Those are all the questions. Please turn in this survey when receiving your Compact Fluorescent Light bulbs.

Thank you for your time!

B.3 REACH PARTICIPANT SURVEY

Data collection instrument begins on next page.

Introduction (all)

Intro. Hello, my name is [interviewer name], and I'm calling on behalf of REACh, the Residential Energy Assistance Challenge program, administered by the Social Development Commission (SDC) in Milwaukee. May I speak with [sample name]?

- 1 Yes [CONTINUE]
- 2 No [SCHEDULE CALLBACK AND/OR ATTEMPT TO CONVERT]

Intro2. I'm with PA Consulting Group, an independent research firm. We have been hired to assist SDC and the state of Wisconsin review the REACh program by speaking with program participants. You should have received a letter a couple of days ago explaining the purpose of this call. I'm not selling anything; I'd just like to ask you some questions about your experience with REACh. I'd like to assure you that your responses will be kept confidential and your name will not be revealed to anyone.

(Why are you conducting this study. Studies like this help the state and federal government better understand household's satisfaction with and need for energy programs like this.)

(Timing: This survey should take 15 minutes of your time, depending upon your situation. Is this a good time for us to speak with you? IF NOT, SET UP CALL BACK APPOINTMENT OR OFFER TO LET THEM CALL US BACK AT 1-800-935-4277.

(Sales concern: I am not selling anything; we would simply like to learn about your experience with REACh, your household's quality of life, and your home's comfort. This information will help the state and federal government best design and deliver energy programs to assist residential customers. Your responses will be kept confidential by our firm. If you would like to talk with someone about this study, feel free to call Jim Cain with the Wisconsin Department of Administration at 608-267-2736).

Screener (all)

S1 Our records indicate that you applied to participate in REACH around [Application Date]. Is this correct?

- 1 Yes [SKIP TO P1]
- 2 No

S2 Is it the date you disagree with or did you not participate in the program?

- 1 Disagree with the date [SKIP TO P1]
- 2 Did not participate in the program

ENERGY Do you or someone in your household pay for . . . ?

- | | | | |
|-----------------|-------|------|--------------|
| a. Electricity | 1 Yes | 2 No | D Don't know |
| b. Heating fuel | 1 Yes | 2 No | D Don't know |
| c. Water | 1 Yes | 2 No | D Don't know |

Pre-program Information (all)

would like to first ask you some questions about getting into the program.

P1 Why were you interested in participating in REACH? [IF R SAYS, SOUNDED LIKE A GOOD PROGRAM, PROBE FOR MORE SPECIFIC ANSWER]

- 1 Wanted to receive weatherization benefits
- 2 Wanted to save energy or money on electric bill
- 3 Wanted to save money in general [SAVE MONEY ON WHAT?]
- 4 Wanted to pay off utility debt
- 5 For the improvements the program can make for my home
- 6 Wanted to receive budget counseling/financial education
- 7 The Energy House demonstrator's information encouraged participation
- 8 The case manager's telephone call made the program sound interesting
- 9 The Energy Assistance representative suggested I participate
- 10 Other [RECORD VERBATIM]
- 11 Don't know

P2 Prior to being accepted into the program, the case manager gave you an assignment checklist to complete. The checklist asked you to do things such as turn down your thermostat and replace your light bulbs with compact fluorescent light bulbs. How difficult was it to complete the assignment checklist? Give us a rating on a 1 to 5 scale, 1 being not at all difficult and 5 being very difficult.

P3 How difficult was the application process to get into the program? Again, please tell us on a scale from 1 to 5, where 1 is not at all difficult and 5 is very difficult.

REACH Program Participation (all)
--

REACH offers many services to participating households. I'm going to read off a list of services. For each, please tell me if you or anyone in your household received the service through REACH.

RP1 Did you or anyone in your household...

A. Tour the Energy House?	1 Yes 2 No D DK R Refused
B. Receive referrals to other programs and services other than REACH or Energy Assistance?	1 Yes 2 No D DK R Refused
C. Receive weatherization assistance through REACH?	1 Yes 2 No D DK R Refused
D. Receive home rehabilitation services through REACH?	1 Yes 2 No D DK R Refused
E. Receive tax assistance through REACH?	1 Yes 2 No D DK R Refused
F. Participate in a 10-minute financial planning workshop in the SDC waiting area while waiting to be serviced by Energy Assistance?	1 Yes 2 No D DK R Refused
G. Attend a two-hour financial planning class? [ALSO KNOWN AS FINANCIAL LITERACY TRAINING]?	1 Yes 2 No D DK R Refused
H. Attend home maintenance classes offered by REACH?	1 Yes 2 No D DK R Refused
I. [IF RENT] Receive a referral to first-time homebuyer classes?	1 Yes 2 No D DK R Refused

EXAMPLES OF WEATHERIZATION SERVICES: receiving a new furnace, a new water heater, insulation, etc.

EXAMPLES OF HOME REHABILITATION SERVICES: roof repairs/replacement, landscaping, siding replacement, window replacement, drywall repairs, electrical repairs, etc.

RP2 Overall, how satisfied are you with the services you have received from REACH: Very satisfied, somewhat satisfied, somewhat dissatisfied, or Very dissatisfied?

- 1 Very dissatisfied
- 2 Somewhat dissatisfied
- 3 Somewhat satisfied
- 4 Very satisfied
- D Don't know

RP3 [IF RP2=1 OR 2] Why were you dissatisfied with the services? [RECORD VERBATIM]

RP4 Overall, how useful have these services been in making your life easier? Please rate the usefulness on a 1 to 5 scale, where 1 is not at all useful and 5 is very useful.

___ Rating

These next questions ask you about some of the specific services your received.

Energy House tour (all who toured the Energy House, per above)

We will start with the Energy House tour.

EH1 How long ago did you tour the Energy House? [RECORD ANSWER IN MONTHS]

___ months [0=LESS THAN 1 MONTH, 1=1 MONTH, ETC.]

88 Don't know

99 Exit code, did not personally take the Energy House tour, skip to next section

EH2 Has anyone else in your household toured the Energy House?

1 Yes → How many? ___

2 No

D Don't know

IF EH1=99 SKIP TO NEXT SECTION

EH3 What parts of the home do you remember seeing in the Energy House? Did you see the . . .[READ]

1 Hallway

2 Kitchen

3 Laundry

4 Bathroom

5 Child's bedroom/Bedroom

6 Basement/Attic/roof room

7 Door/window room

EH4 I am going to read to you some energy saving tips that could have been discussed in the tour. For each, please tell me if you remember seeing anything about these topics during your tour of the Energy House. Did you see information about . . . [RANDOMLY ASK 7 OF THESE ENERGY SAVING TIPS]

A.	Replacing incandescent light bulbs with energy saving compact fluorescent light bulbs	1 Yes 2 No D DK R Refused
B.	Purchasing energy efficient or ENERGY STAR appliances when replacing older appliances	1 Yes 2 No D DK R Refused
C.	Using programmable thermostats to control heat and cooling costs	1 Yes 2 No D DK R Refused
D.	Using cold water for laundry	1 Yes 2 No D DK R Refused
E.	Installing aerators on bathroom faucets	1 Yes 2 No D DK R Refused
F.	Replacing showerheads with low-flow shower heads	1 Yes 2 No D DK R Refused
G.	Replacing a large toilet tank with a smaller one, or inserting a "Tank Bank" in tank	1 Yes 2 No D DK R Refused
H.	Using curtains to block drafts in the winter and keep heat out in the summer	1 Yes 2 No D DK R Refused
I.	Moving furniture away from vents	1 Yes 2 No D DK R Refused
J.	Lowering your water heater temperature to 120° F	1 Yes 2 No D DK R Refused
K.	Changing the furnace filter regularly to improve furnace performance	1 Yes 2 No D DK R Refused
L.	Insulating your water heater and pipes	1 Yes 2 No D DK R Refused
M.	Sealing up leaky windows with rope caulk or plastic to avoid drafts	1 Yes 2 No D DK R Refused
N.	Installing weather strips on doors to block drafts	1 Yes 2 No D DK R Refused
O.	Looking for air leaks in areas such as baseboards and kitchen cabinets	1 Yes 2 No D DK R Refused

EH5 How much of what you learned about in the Energy House were you able to do in your home? [READ CATEGORIES]

- 1 None (SKIP TO EH6)
- 2 A little
- 3 Some
- 4 A lot
- 5 All of it

EH5a What did you do? [RECORD VERBATIM]

EH5b Do you feel that, as a result of making these changes, your home is more comfortable, less comfortable, or you do not notice a difference in comfort?

- 1 More comfortable
- 2 Less comfortable
- 3 No difference

EH5c Did you feel that, as a result of making these changes, your utility bills are lower, higher, or unchanged?

- 1 Lower
- 2 Higher
- D Unchanged

SKIP TO EH7

EH6 (IF EH5=1) Why weren't you able to do anything you learned about in the Energy House [RECORD VERBATIM]?

EH7 [(IF MORE THAN 1 HH MEMBER AND EH2=2 OR D) OR (EH2=1 AND #HHM>EH2A)] Did you share what you learned in the Energy House with other household members?

- 1 Yes
- 2 No
- D Don't know

Program referrals (all who received a program referral, per above)

I would like to also talk to you about other programs REACh referred you to.

R1 What programs, other than the Wisconsin Home Energy Assistance Program, did the case manager refer you to? [DO NOT READ]

- 1 None – exit code, mistakenly said received referral [SKIP TO NEXT SECTION]
- 2 Weatherization Assistance Program
- 2 JOBS, or other employment service
- 3 Head Start
- 4 Section 8 rental assistance
- 5 Food stamp program
- 6 Medicaid
- 7 WIC
- 8 Childhood Lead Protection Program
- 9 Neighborhood Housing Services
- 10 Other (specify)
- 11

I would like to ask you a few questions about the programs you just mentioned.

[FOR ALL PROGRAMS MENTIONED, ASK THE FOLLOWING QUESTIONS:]

R2 Prior to participating in REACH, had you ever heard of [PROGRAM]?

- 1 Yes
- 2 No [SKIP TO R4]
- D Don't know [SKIP TO R4]
- R Refused [SKIP TO R4]

R3 Prior to participating in REACH, had you ever been in contact with [PROGRAM]?

- 1 Yes
- 2 No
- D Don't know
- R Refused

R4 Did you contact [PROGRAM] as a result of the referral?

- 1 Yes [SKIP TO R6]
- 2 No
- D Don't know [SKIP TO R6]
- R Refused [SKIP TO R6]

R5 Why didn't you contact [PROGRAM]? [RECORD VERBATIM]

R6 How useful do you feel the referral to [PROGRAM] was for you/your household?
Please rate on a 1 to 5 scale, 1 being not at all useful and 5 being very useful.

Weatherization/Rehab benefits (all who received Wx/rehab, per above)

This next section asks you about your experiences with the weatherization and/or rehabilitation services you received through REACH. For this interview, we will refer to both services as weatherization benefits.

W1 Has the weatherization work on your home been completed yet?

- 1 Yes
- 2 No [SKIP TO NEXT SECTION]
- D Don't know
- E Exit code – didn't receive weatherization benefits [SKIP TO NEXT SECTION]

W2 As part of the weatherization process, did you receive information or training on how to keep the new equipment installed in your home running properly?

- 1 Yes
- 2 No
- D Don't know
- N Not applicable, did not receive new equipment

W3 As part of the weatherization process, did you receive information or training on how to reduce energy use in your newly weatherized home?

- 1 Yes
- 2 No
- D Don't know

W4 [IF W2=1 OR W3=1] Do you use the information you received about [IF W2=1: maintaining your equipment] and [if W3=1: reducing energy in your home]?

- 1 Yes
- 2 No
- D Don't know

W5 What do you do differently now that you didn't do before your home was weatherized?
[RECORD VERBATIM]

W6 On a scale of 1 to 5, where 1 is "not at all satisfied" and 5 is "very satisfied," how satisfied are you with your experiences in the following?

D=DON'T KNOW

- ___ The amount of time it took to receive weatherization services
- ___ The quality of work done on your home
- ___ The types of improvements made
- ___ Knowledge of person(s) you talked with about the work done on your home

W7 [IF ANY OF W2 IS RATED 1 OR 2] Why were you dissatisfied with . . . [LIST ASPECTS DISSATISFIED; RECORD VERBATIM]

Tax assistance (all who received tax assistance, per above)

- T1 You mentioned that you received tax assistance through REACh. Did you receive assistance for the 2003 tax season or for this current, 2004 tax season?
- 1 2003 tax season
 - 2 This current 2004 tax season
 - D Don't know SKIP TO NEXT SECTION
 - E Exit code – mistakenly noted received tax assistance through REACh [SKIP TO NEXT SECTION]
- T2 What benefits did your household get out of this tax service? [DO NOT READ. INDICATE ALL THAT APPLY.]
- 1 Received more of a refund / Had to pay less into taxes
 - 2 Took less time for them to complete
 - 3 Made tax filing easier or less confusing
 - 4 Received refund quicker
 - 5 They were able to complete the forms more accurately
 - 6 Other (specify)
 - D Don't know
- T3 How could this service have helped your household more? [DO NOT READ. INDICATE ALL THAT APPLY.]
- 1 No other way it could have helped more
 - 2 Staff could have been more available
 - 3 Waited less time to receive tax service
 - 4 Other (specify)
 - D Don't know
- T4 Please tell us how satisfied you were with the tax assistance service using a scale from 1 to 5, 1 being not at all satisfied and 5 being very satisfied.
- T5 [IF T4=1 OR 2] Why were you dissatisfied with the tax assistance service? [RECORD VERBATIM]

Financial classes

F1 [IF ATTENDED SHORT SESSION] Think back to the short, 10-minute financial workshop you participated in. What information was presented to you at that time? [DO NOT READ. INDICATE ALL THAT APPLY.]

- 1 Budgeting
- 2 Opening a checking and/or savings account
- 3 Credit cards
- 4 Importance of credit rating
- 5 Improving credit rating
- 6 Monthly budget billing for utilities
- 7 Other (specify)
- D Don't know

F2 How useful was this short financial workshop to your household? Was it...

- 1 Not at all useful
- 2 Not very useful
- 3 Somewhat useful
- 4 Very useful
- D Don't know [DON'T READ]

IF DID NOT ATTEND LONG CLASSES, SKIP TO NEXT SECTION.

F3 Think about the financial sessions you attended as part of REACh. Did the class cover the following information with you?

Did the class talk about...

A.	Budgeting techniques and tips	1 Yes2 No D DKR Refused
B.	Opening a checking and/or saving account	1 Yes2 No D DKR Refused
C.	Managing/using credit cards	1 Yes2 No D DKR Refused
D.	Monthly budget billing for utilities	1 Yes2 No D DKR Refused
E.	Saving or investing money	1 Yes2 No D DKR Refused
F.	Understanding your credit report	
G.	Your rights and responsibilities as a consumer	
H.	Purchasing a home	
I.	Anything else you want to mention? (specify)	1 Yes2 No D DKR Refused

- F4 What information presented at the financial class was most useful to your household?
[RECORD OPEN RESPONSE VERBATIM]
- F5 Do you feel you will be able to improve your household finances based on information presented at this class?
- 1 Yes → How? [RECORD VERBATIM]
 - 2 No → Why not? [RECORD VERBATIM]
 - D Don't know
- F6 What changes have you made since taking this financial class? [DO NOT READ. INDICATE ALL THAT APPLY]
- 1 None
 - 2 Set up budget billing with the utility
 - 3 Created a budget for our household
 - 4 Other (SPECIFY)
- F7 Did you feel the amount of information presented to you in the 2-hour session was...
- 1 Not enough information
 - 2 About right
 - 3 Too much information
- F8 [IF F7=1] What else would you have liked discussed? [RECORD OPEN RESPONSE VERBATIM]
- F9 [IF F7=3] What information would you want left out? [RECORD OPEN RESPONSE VERBATIM]
- F10 Please tell us how satisfied you were with the financial class using a scale from 1 to 5, 1 being not at all satisfied and 5 being very satisfied.
- F11 [IF F10=1 OR 2] Why were you dissatisfied with the financial class? [RECORD VERBATIM]

Home maintenance classes (for all who participated in classes)

HM1 Regarding home maintenance classes, please tell me how useful you felt the classes were for your household? Did you feel the classes were...

- 1 Not at all useful
- 2 Not very useful
- 3 Somewhat useful
- 4 Very useful
- D Don't know [DON'T READ]
- E Exit code, didn't attend home maintenance classes [SKIP TO NEXT SECTION]

HM1a Did you use any of the information presented in these classes to improve the maintenance of your home?

- 1 Yes
- 2 No [SKIP TO HM2]
- D Don't know [SKIP TO HM2]

HM1b What did you do? [RECORD VERBATIM]

HM2 [IF HM1=1 OR 2] How could the classes have been made more useful? [RECORD VERBATIM]

HM3 Did you feel the amount of information presented to you in the 3-hour session was...

- 1 Not enough
- 2 About right
- 3 Too much

HM4 [IF HM3=1] What else would you have liked discussed? [RECORD OPEN RESPONSE VERBATIM]

HM5 [IF HM3=3] What information would you want left out? [RECORD OPEN RESPONSE VERBATIM]

HM6 Please tell us how satisfied you were with the maintenance class using a scale from 1 to 5, 1 being not at all satisfied and 5 being very satisfied.

HM7 [IF HM6=1 OR 2] Why were you dissatisfied with the maintenance class? [RECORD VERBATIM]

Household and living conditions (all)
--

Now we would like to learn about the comfort of your home and your living conditions over the past year.

HH1 [SKIP IF DID NOT RECEIVE WEATHERIZATION OR REHAB SERVICES OR SERVICES ARE NOT COMPLETE] Prior to receiving weatherization benefits through REACH...

For each:

- 1 Yes
- 2 No
- D Don't know

A.	Did you notice any drafts?
B.	Were some rooms colder than others during the winter?
C.	Did you have mold or mildew in your home?
D.	Did you have problems with your heating system?
E.	Did you have problems with your water heater?
F.	Were some of your appliances, such as your refrigerator, oven or dishwasher, not working properly?
G.	Did you notice any gas leaks?
H.	Was your roof in need of repair or replacement?

HH2 [IF RECEIVED WEATHERIZATION OR REHAB]: Thinking about your home currently....

[IF DID NOT RECEIVE WEATHERIZATION OR REHAB] Thinking about your home over the past 12 months...

For each:

- 1 Yes
- 2 No
- D Don't know

A.	(Do/Have) you notice(d) any drafts?
B.	(Are/Were) some rooms colder than others during the winter?
C.	(Do/Did) you have mold or mildew in your home?
D.	(Do/Did) you have problems with your heating system?
E.	(Do/Did) you have problems with your water heater?
F.	(Are/Were) some appliances, such as your refrigerator, oven or dishwasher, not working properly?
G.	(Do/Did) you notice any gas leaks?
H.	(Is/Was) your roof in need of repair or replacement?

HH3 In this next question, I'd like to ask you about some things that might have happened to your household in the past year. In the past 12 months...

A.	Were you or your family ever uncomfortable in your home because you kept the heat lower than you would like in order to reduce heating costs?	1 Yes	2 No	D DK	R Refused
B.	Did you use portable kerosene heaters for heat?	1 Yes	2 No	D DK	R Refused
C.	Did you use portable electric heaters for heat?	1 Yes	2 No	D DK	R Refused
D.	Did you use a cooking stove or fireplace for heat?	1 Yes	2 No	D DK	R Refused
E.	Did you close off some rooms so they would not need to be heated?	1 Yes	2 No	D DK	R Refused
F.	Did you ever limit your purchase of food, medicine or other necessities in order to pay for your utility or fuel bill?	1 Yes	2 No	D DK	R Refused
G.	Was there any time when you did not have a telephone or your telephone was disconnected because you or your family could not pay the bill?	1 Yes	2 No	D DK	R Refused
H.	Did you or your family ever move in with other people, even for a little while, because you could not pay the rent or mortgage, or utility bills?	1 Yes	2 No	D DK	R Refused
I.	Were you ever homeless or living in a shelter?	1 Yes	2 No	D DK	R Refused

HH5 I'm going to read several types of expenses you might have in your household. For each one, please tell me how concerned you are with meeting each expense on a scale of 1 to 5, with 1 meaning "not at all concerned" and 5 meaning "very concerned." How concerned are you with meeting. . . . ? [READ EACH ITEM.] ROTATE

A.	[IF OWN] Property taxes	1	2	3	4	5	N	NA	D	DK	R	Ref
B.	Medical and health expenses	1	2	3	4	5	N	NA	D	DK	R	Ref
C.	[IF PAY HEAT] Winter heating costs	1	2	3	4	5	N	NA	D	DK	R	Ref
D.	[IF PAY ELEC] Monthly electric costs	1	2	3	4	5	N	NA	D	DK	R	Ref
E.	Mortgage or rent costs	1	2	3	4	5	N	NA	D	DK	R	Ref
F.	Food expenses	1	2	3	4	5	N	NA	D	DK	R	Ref
G.	Telephone costs [IF ASK: refer to primary telephone, be it cell phone or land line]	1	2	3	4	5	N	NA	D	DK	R	Ref

- HH6 I'm going to read a list of programs that provide assistance to families. For each one, please tell me if you or anyone in your household received help from that program in the past two years. Did you or anyone in your household... [READ CATEGORIES BELOW AND RECORD ANSWER.]

a. Receive food stamps?	1 yes	2 no	d DK	r R
b. Receive cash payments from W-2 (INT NOTE: Wisconsin Works) or TANF (INT NOTE: Temporary Assistance for Needy Families)	1 yes	2 no	d DK	r R
c. Participate in WIC, or the Women, Infant, and Children Program	1 yes	2 no	d DK	r R
d. Receive Medical Assistance (INT NOTE: MA, Medicaid, or Title 19)	1 yes	2 no	d DK	r R
e. Receive assistance from the government in paying for your housing? INT NOTE: For example, did you receive a rent subsidy or pay a lower rent because the government pays part of the cost? (IF ASK FOR CLARIFICATION: Section 8, Section 12)	1 yes	2 no	d DK	r R
f. Participate in We Energies Compact Fluorescent Lightbulb Pilot? You would have received a pack of bulbs when applying for Energy Assistance or REACH.	1 yes	2 no	d DK	r R
g. Participate in the Childhood Lead Prevention Program?	1 yes	2 no	d DK	r R

Energy Use and Utility Bills (all)

I'd next like to talk to you about your energy use and utility bills.

- E1 On a scale of 1 to 5, with 1 meaning "no control" and 5 meaning "a great deal of control", how much control do you feel you have over how your household uses energy? _____ [RECORD D FOR DON'T KNOW]
- E2 Since participating in the REACH would you say that you now have more control, about the same control, or less control over how your household uses energy?
- 1 More control
 - 2 About the same
 - 3 Less control
 - D Don't know

[IF ENERGYA AND ENERGYB = 2 OR "D" SKIP TO FIN1]

E3A How much do you currently owe for utility and fuel costs?

E3B Other than what you owe for THIS MONTH'S utility and fuel costs, do you owe any money for utility and fuel bills for previous months?

- 1 Yes
- 2 No (Skip to E5)
- D Don't know (Skip to E5)

E4 Not including this month's bill, about how much do you owe for utility and fuel bills for previous months?

\$_____

E5 Thinking back to this time last year, other than what you owed for THE CURRENT MONTH'S utility and fuel costs, did you owe any money for utility and fuel bills for previous months?

- 1 Yes (If E3B=2 or E3B="D" skip to E7)
- 2 No (Skip to E7)
- D Don't know (Skip to E7)

E6 [ONLY ASK IF E3=1 AND E5=1] Would you say the past-due amount you owe on your utility and fuel bills this year is less, about the same, or more than the past-due amount you owed at this time last year?

- 1 Less
- 2 The same
- 3 More
- D Don't know

E7 In the two years before participating in REACH, had you ever had your electricity, natural gas, or fuel service turned off for lack of payment or because payments were late?

- 1 Yes
- 2 No
- D Don't know or not sure

E8 Since participating in REACh, has your electricity, natural gas, or fuel service been turned off for lack of payment or because payments were late?

- 1 Yes
- 2 No
- D Don't know or not sure

E9 I am going to read a statement about your energy bill payment. For each, please tell me whether the statement was often true, sometimes true, or rarely true for your household in the past 12 months.

A. In the past 12 months, we did not have enough money to pay even <i>part</i> of the energy bill when it came due	1 Often true 2 Sometimes true 3 Rarely true D Don't know
B. [IF E9A=2 OR 3] Again, please tell me if the following statement was often true, sometimes true, or rarely true of your household in the past 12 months. In the past 12 months, we did not have enough money to pay the <i>full amount</i> of our energy bill when it came due	1 Often true 2 Sometimes true 3 Rarely true D Don't know

E10 If you had not participated in REACh, do you think your household would be paying fewer, the same amount, or more utility and fuel bills on time?

- 1 Pay fewer bills on time
- 2 Pay the same amount of bills on time
- 3 Pay more bills on time
- D Don't know or not sure

Financials (all)

We're nearly done – I have just a few more questions for you.

FIN1 [IF RENT] Not including what you will owe for THIS MONTH's rent, do you owe rent payments for any previous months at your current address?

- 1 Yes
- 2 No
- D Don't know
- R Refused

FIN2 Do you currently owe more than \$250 for medical bills, including doctor or dentist bills, prescription drug payments, or hospital fees?

- 1 Yes
- 2 No
- D Don't know
- R Refused

Follow-up (all)

FU1 To learn more about your experiences and satisfaction with REACH over time, we would like to briefly speak with you again after you've had more experience with the program. Would it be okay with you if we call you in the future to talk to you about REACH? [INTERVIEWER NOTE: WE WILL CALL THEM AGAIN IN ABOUT A YEAR'S TIME.]

- 1 Yes
- 2 No

Those are all the questions I have for you. Thank you for your time.

B.4 NONPARTICIPANT SURVEY

Data collection instrument begins on next page.

Introduction (all)

Intro. Hello, my name is [interviewer name], and I'm calling on behalf of the state of Wisconsin. May I speak with [sample name]?

- 1 Yes [CONTINUE]
- 2 No [SCHEDULE CALLBACK AND/OR ATTEMPT TO CONVERT]

Intro2. I'm with PA Consulting Group, an independent research firm. We have been hired to assist the state of Wisconsin to review some of the services they offer to households. You should have received a letter a couple of days ago explaining the purpose of this call. I'm not selling anything; I'd just like to ask you some questions about your home's comfort, safety and energy efficiency. I'd like to assure you that your responses will be kept confidential and your name will not be revealed to anyone.

(Why are you conducting this study: Studies like this help the state better understand household's awareness of, satisfaction with and need for energy programs like this.)

(Timing: This survey should take 10 minutes of your time. Is this a good time for us to speak with you? IF NOT, SET UP CALL BACK APPOINTMENT OR OFFER TO LET THEM CALL US BACK AT 1-800-935-4277.

(Sales concern: I am not selling anything; we would simply like to learn about your household's quality of life, and your home's comfort, safety, and energy efficiency. This information will help the state best design and deliver energy programs to assist residential customers. Your responses will be kept confidential by our firm. If you would like to talk with someone about this study, feel free to call Jim Cain with the Wisconsin Department of Administration at 608-267-2736).

(Where did you get my name: We received your name from the Wisconsin Home Energy Assistance Program, or Energy Plus.

S1 Before we begin, I would like to verify that you qualify for this study. Could you please tell me your zip code of your home?

- 1 53204 or 53215
- 2 Any other zip code [THANK AND TERMINATE]

S2 Our records indicate that you applied for Energy Assistance this year. Is this correct?

- 1 Yes
- 2 No
- D Don't know
- E Exit code, did not apply for Energy Assistance

ENERGY Do you or someone in your household pay for . . . ?

- | | | | |
|-----------------|-------|------|--------------|
| a. Electricity | 1 Yes | 2 No | D Don't know |
| b. Heating fuel | 1 Yes | 2 No | D Don't know |
| c. Water | 1 Yes | 2 No | D Don't know |

Awareness of REACh

Great, thank you.

A1 I would like to first ask you some questions about a program called the Residential Energy Assistance Challenge, or REACh. REACh helps households understand how they can save money by offering services such as energy education and financial training. Have you heard of REACh? [IF NEEDED: REACh IS ADMINISTERED THROUGH THE SOCIAL DEVELOPMENT COMMISSION, SDC-MILWAUKEE. YOU MAY HAVE HEARD OF IT IF YOU TOOK THE ENERGY HOUSE TOUR]

- 1 Yes
- 2 No [SKIP TO A3]
- D Don't know [SKIP TO A3]

A2 Where did you hear about REACh?

- 1 Energy House tour
- 2 Referral from Energy Assistance (WHEAP) staff
- 3 Telephone call from REACh staff after the Energy House tour
- 4 Friend/relative/neighbor
- 5 Weatherization Assistance Program
- 6 WRAP program
- 7 News article in newspaper
- 8 Public Service Announcement
- 9 Other social service program referral (Which one? _____)
- 10 Other (record)
- 11 Don't know

A3 [IF A2=1 SKIP] The REACH program is run out of the Social Development Commission, or SDC, where you applied for Energy Assistance. REACH funded a model home called the Energy House. The Energy House is located inside the lobby of SDC. You can tour the Energy House and walk through different rooms that show how you can save energy in your home. Did you, or anyone in your household, go through the Energy House at the SDC?

- 1 Yes
- 2 No
- D Don't know

A4 Were you, or anyone in your household, contacted by someone from REACH to participate in the program?

- 1 Yes
- 2 No [SKIP TO A8]
- D Don't know [SKIP TO A8]

A5 Has your household applied to participate in the program?

- 1 Yes [SKIP TO A7]
- 2 No
- D Don't know [SKIP TO A8]

A6 Why did you decide to not participate in the program? [RECORD VERBATIM]

SKIP TO HH1

A7 Has your household been accepted into the program?

- 1 Yes [THANK AND TERMINATE]
- 2 No
- D Don't know

- A8 As I mentioned, REACH offers many different services. I would like to read a description of some of the services REACH offers. For each, please tell me how interested you would be in receiving this type of service through REACH, 1 being not at all interested and 5 being very interested.

A How interested would you be in receiving financial counseling for your household through REACH? This would be a two-hour session where someone speaks to you about budget planning, credit rating, and ways to manage your finances?	1 Not at all interested 5 Very interested D Don't know R Refused
B How interested would you be in attending a home maintenance class through REACH? This is a three-hour class where someone provides general maintenance tips for your home.	1 Not at all interested 5 Very interested D Don't know R Refused
C [IF DON'T PAY FOR ENERGY (ENERGYA=2 OR D AND ENERGYB = 2 OR D) SKIP] How interested would you be in having a co-payment arrangement with your utility company? As part of this arrangement, you would pay a certain amount for your energy bill on a monthly basis, and the program would also pay that amount toward your bill.	1 Not at all interested 5 Very interested D Don't know R Refused
D How interested would you be in having REACH make improvements to your home? For example, the program may replace broken appliances, improve the structure of your home, and increase the insulation in your home.	1 Not at all interested 5 Very interested D Don't know R Refused
E Last, how interested would you be in having a case manager come to your house and speak with you about other social programs that may be helpful for you?	1 Not at all interested 5 Very interested D Don't know R Refused

- A9 REACH requires active household participation. In order to be part of the program, households must be willing to make energy saving changes in their home such as decreasing the temperature of the house in the winter and using compact fluorescent light bulbs. Overall, how interested would you be in participating in REACH? Again, use a 1 to 5 scale where 1 is not at all interested and 5 is very interested.

- A10 [IF A10=1 OR 2] Why wouldn't you be interested in participating in REACH?

Household and living conditions

Now we would like to learn about the comfort of your home and your living conditions over the past year.

HH1 Thinking about your home over the past 12 months...

A. Have you noticed any drafts?	1 Yes 2 No D DK R Refused
B. Were some rooms colder than others during the winter?	1 Yes 2 No D DK R Refused
C. Did you have mold or mildew in your home?	1 Yes 2 No D DK R Refused
D. Did you have problems with your heating system?	1 Yes 2 No D DK R Refused
E. Did you have problems with your water heater?	1 Yes 2 No D DK R Refused
F. Were some appliances, such as your refrigerator, oven or dishwasher, not working properly?	1 Yes 2 No D DK R Refused
G. Did you notice any gas leaks?	1 Yes 2 No D DK R Refused
H. Was your roof in need of repair or replacement?	1 Yes 2 No D DK R Refused
I. Did you have any other problems we didn't mention?	1 Yes 2 No D DK R Refused

HH2 In this next question, I'd like to ask you about some things that might have happened to your household in the past year. In the past year...

A. Were you or your family ever uncomfortable in your home because you kept the heat lower than you would like in order to reduce heating costs?	1 Yes 2 No D DK R Refused
B. Did you use portable kerosene heaters for heat?	1 Yes 2 No D DK R Refused
C. Did you use portable electric heaters for heat?	1 Yes 2 No D DK R Refused
D. Did you use a cooking stove or fireplace for heat?	1 Yes 2 No D DK R Refused
E. Did you close off some rooms so they would not need to be heated?	1 Yes 2 No D DK R Refused
F. Did you ever limit your purchase of food, medicine or other necessities in order to pay for your utility or fuel bill?	1 Yes 2 No D DK R Refused
G. Was there any time when you did not have a telephone or your telephone was disconnected because you or your family could not pay the bill?	1 Yes 2 No D DK R Refused
H. Did you or your family ever move in with other people, even for a little while, because you could not pay the rent or mortgage, or utility bills?	1 Yes 2 No D DK R Refused
I. Were you ever homeless or living in a shelter?	1 Yes 2 No D DK R Refused

- HH3 I'm going to read several types of expenses you might have in your household. For each one, please tell me how concerned you are with meeting each expense on a scale of 1 to 5, with 1 meaning "not at all concerned" and 5 meaning "very concerned." How concerned are you with meeting. . . . ? [READ EACH ITEM.]

A. [IF OWN] Property taxes	1	2	3	4	5	N	NA	D	DK	R	Ref
B. Medical and health expenses	1	2	3	4	5	N	NA	D	DK	R	Ref
C. [IF PAY HEAT] Winter heating costs	1	2	3	4	5	N	NA	D	DK	R	Ref
D. [IF PAY ELEC] Monthly electric costs	1	2	3	4	5	N	NA	D	DK	R	Ref
E. Mortgage or rent expenses	1	2	3	4	5	N	NA	D	DK	R	Ref
F. Food expenses	1	2	3	4	5	N	NA	D	DK	R	Ref
G. Telephone costs	1	2	3	4	5	N	NA	D	DK	R	Ref

- HH4 I'm going to read a list of programs that provide assistance to families. For each one, please tell me if you or anyone in your household received help from that program in the past two years. Did you or anyone in your household... [READ CATEGORIES BELOW AND RECORD ANSWER.]

a. Receive food stamps?	1	yes	2	no	d	DK	r	R
b. Receive cash payments from W-2 (Wisconsin Works) or TANF (Temporary Assistance for Needy Families)	1	yes	2	no	d	DK	r	R
c. Participate in WIC, also known as the Women, Infant, and Children Program	1	yes	2	no	d	DK	r	R
d. Receive Medical Assistance (MA, Medicaid, or Title 19)	1	yes	2	no	d	DK	r	R
e. Receive assistance from the government in paying for your housing? [For example, did you receive a rent subsidy or pay a lower rent because the government pays part of the cost?] (IF ASK FOR CLARIFICATION: Section 8, Section 12)	1	yes	2	no	d	DK	r	R
f. Participate in We Energies Compact Fluorescent Lightbulb Program? You would have received a pack of bulbs when applying for Energy Assistance	1	yes	2	no	d	DK	r	R
g. Participate in the Childhood Lead Prevention Program?	1	yes	2	no	d	DK	r	R

Energy Use and Utility Bills (all)

I'd next like to talk to you about your energy use and utility bills.

- E1 On a scale of 1 to 5, with 1 meaning "no control" and 5 meaning "a great deal of control", how much control do you feel you have over how your household uses energy? _____ [RECORD D FOR DON'T KNOW]

[IF RENT AND DO NOT PAY FOR ANY ENERGY BILLS, SKIP TO NEXT SECTION]

E2A How much do you currently owe for utility and fuel costs?

E2b Other than what you owe for THIS MONTH'S utility and fuel costs, do you owe any money for utility and fuel bills for previous months?

- 1 Yes
- 2 No (Skip to E4)
- D Don't know (Skip to E4)

E3 Not including this month's bill, about how much do you owe for utility and fuel bills for previous months?

\$_____

E4 Thinking back to this time last year, other than what you owed for THE CURRENT MONTH'S utility and fuel costs, did you owe any money for utility and fuel bills for previous months?

- 1 Yes (If E2=2 or E2="D" skip to E6)
- 2 No (Skip to E6)
- D Don't know (Skip to E6)

E5 [ONLY ASK IF E2=1 AND E4=1] Would you say the past-due amount you owe on your utility and fuel bills this year is less, about the same, or more than the past-due amount you owed at this time last year?

- 1 Less
- 2 The same
- 3 More
- D Don't know

E6 In the last two years have you ever had your electricity, natural gas or fuel service turned off for lack of payment or because payments were late?

- 1 Yes
- 2 No
- D Don't know

E7 I am going to read two statements about your energy bill payment. For each, please tell me whether the statement was often true, sometimes true, or rarely true for your household in the past 12 months.

A. In the past 12 months, we did not have enough money to pay even <i>part</i> of the energy bill when it came due	1 Often true 2 Sometimes true 3 Rarely true D Don't know
B. [IF E7A=2 OR 3] Again, please tell me if the following statement was often true, sometimes true, or rarely true of your household in the past 12 months. In the past 12 months, we did not have enough money to pay the <i>full amount</i> of our energy bill when it came due	1 Often true 2 Sometimes true 3 Rarely true D Don't know

Financials (all)

We're nearly done – I have just a few more questions for you.

F1 [IF RENT] Not including what you will owe for THIS Month's rent, do you owe rent payments for any previous months at your current address?

- 1 Yes
- 2 No
- D Don't know
- R Refused

F2 Do you currently owe more than \$250 for medical bills, including doctor or dentist bills, prescription drug payments, or hospital fees?

- 1 Yes
- 2 No
- D Don't know
- R Refused

Follow-up

FU1 To learn more about your household's comfort, safety, and energy needs over time, we would like to call you again next year to ask you a similar set of questions. Would it be okay with you if we call you again?

- 1 Yes
- 2 No

FU2 I would like to quickly verify your address. Are you located at: [ADDRESS]?

- 1 Yes
- 2 No -> COLLECT NEW ADDRESS

Those are all the questions I have for you. Thank you for your time.

APPENDIX C: DATA COLLECTION RESPONSE RATES

Wisconsin Department of Administration: REACH Participant and Nonparticipant Surveys

Calling through 3/7/05

	REACH Participant	REACH Nonparticipant
Starting Sample	88	505
Ineligible - outside zip code area		2
Ineligible - confirm received REACH benefits		7
Ineligible - live in nursing home	1	0
Ineligible - Deceased	0	1
Non-residential number	0	2
Adjusted Sample	87	493
Refused	4	23
No/bad phone number	8	79
Incapable/language barrier	2	15
Not available for duration	0	2
R not at number	2	20
R claims didn't apply for WHEAP / didn't participate in REACH	1	2
R claims participated in REACH (confirmed did not)		3
Eligible non-contact/non-interview	18	134
Complete	52	215
Response Rate	59.8%	43.6%

APPENDIX D: ENERGY HOUSE TOUR

The Energy House is innovative one aspect of Wisconsin's REACH program that appears to be unique to this state. Therefore, we feel it is worthy to present the Energy House to the reader in order to understand the level and variety of energy conservation information individuals may see as they go through the prototype.

REACH Milwaukee staff noted that feedback from tour participants about the Energy House has been positive. The REACH Milwaukee program manager discussed the impact the Energy House has had for WHEAP and clients waiting to be serviced:

"The processors last year felt that Energy House really helped with the impatience of waiting for Energy Assistance. Instead of getting to their appointment and getting upset, they were still excited two hours later because they'd gotten all this information and couldn't wait to go home to apply it. So, anecdotally we've seen tremendous affects of the energy house."

Below we provide the reader with an Energy House tour. Rooms devised in the Energy House, discussed in more detail below, are as follows: 1) Hallway; 2) Kitchen and laundry facilities; 3) Bathroom; 4) Child's bedroom; 5) Basement/attic/roof; 6) Window and door room.

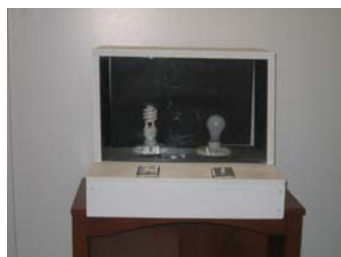
D.1 HALLWAY

The hallway demonstrates:

- Compact Fluorescent Light bulbs
- Programmable thermostat
- Energy saving television

Entering the Energy House, the tour participants are first asked to complete the guest book. This guest book serves as an essential outreach tool for case managers.

The first demonstration given in each Energy House tour is the Compact Fluorescent Light demonstration. The box has two bulbs – one CFL and one standard 60-watt light bulb. The demonstrator will first turn on the standard light bulb, followed by the CFL. Then both light bulbs are turned on at the same time to demonstrate that there is little to no difference in light quality. Money saved by replacing all bulbs with CFL's is then discussed.



CFL demonstration – lights off then lights on

The demonstrator then discusses the use of programmable thermostats. Two thermostats are shown – a typical dial thermostat and a programmable thermostat. The energy savings associated with the programmable thermostat – *if used effectively* – is discussed. The demonstrator will show how to use the programmable thermostat. At this point, the demonstrator discusses the state weatherization program, WRAP and REACH, saying that if they participate in one of these programs, someone will install a thermostat as well as provide an in-home tutorial of how to use it..



Thermostats

Last, an ENERGY STAR® television is shown to the crowd. These televisions do not consume energy while on stand-by; they turn off completely, just as the old televisions used to. Additionally, if the channel or volume level has not been changed for some time, the television shows a message on the screen asking if anyone is watching. If there is no response, then it turns off automatically. The television in the Energy House was purchased at WalMart for a price similar to an equivalent sized non- ENERGY STAR televisions.



Energy-efficient television

D.2 KITCHEN AND LAUNDRY FACILITIES

The kitchen and laundry facilities demonstrate:

- Energy efficient appliances
- Tips for saving energy while cooking
- Tips for saving energy doing laundry

The kitchen and laundry facilities are located to the right of the hallway (as is the bathroom, discussed next). The kitchen and laundry facilities demonstrate ENERGY STAR appliances and provide easy-to-implement energy saving tips while cooking and doing laundry.

The laundry facility includes a front-load, ENERGY STAR washing machine and energy saving dryer. Demonstrators discuss the water saving benefits of using an energy saving washer and dryer, as well as the impact of only washing clothes in cold water. Alongside the washer and dryer is a clothes-drying rack. Clients are at this point encouraged to dry their clothes outside, or on a clothes rack, rather than use the clothes dryer.



Kitchen

Another component of the laundry facility demonstration is a small hardware piece that attaches to the dryer hose at the point of entry into the dryer. This piece keeps cold air from coming into the dryer through the hose in the winter by blocking the airway, yet allows the heat to escape out of the home. This piece, which typically costs about \$5 at a hardware store, makes the heating of the dryer more effective by keeping the cold air out.

Also discussed in the laundry facility section is the health and safety aspect of venting the dryer correctly. Not venting the dryer to the outside of the house can create mold and mildew issues as well as other air quality problems.

Following the laundry facility is the kitchen section. Again, the benefits of ENERGY STAR appliances are demonstrated through the refrigerator, and clients are shown how to read ENERGY STAR labels.



Energy-efficient refrigerator

In the kitchen the demonstrator discusses low-cost energy saving tips, such as using alternate cooking sources (i.e., microwave and grill), and running the dishwasher during off-peak evening hours.

D.3 BATHROOM

The bathroom demonstrates:

- Faucet aerators and low-flow shower heads
- Preventing mold and mildew
- Saving water

The bathroom section of the Energy House consists of a sink with faucet, a shower, and two toilets.

At the sink, the demonstrator discusses the water-saving benefits of installing faucet aerators. While talking, the demonstrator takes off the faucet head and installs the aerator. She does this to exemplify how easy it is to install the aerator – after which the amount of money each aerator saves is discussed.



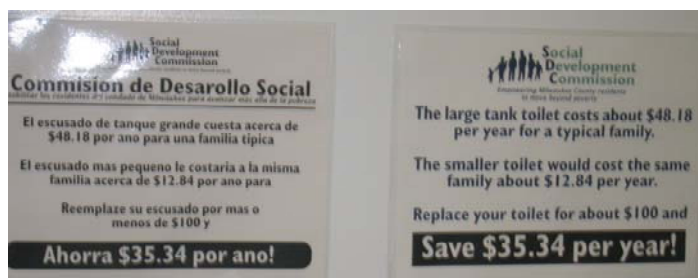
The shower area is presented next. At the shower, water-saving techniques are discussed, such as changing out the shower head with a low-flow shower head, and placing a 5-minute timer in the shower to serve as a sort of indication of how long the shower is taking (encouraging clients to end a shower within 5 minutes).



Shower demonstration w/timer

Mold and mildew is again discussed during the shower presentation. The demonstrator explains that many low-income bathrooms have poor or no ventilation. This means that condensation built up from a shower could lead to mold and mildew problems. The shower demonstration includes a rubber scraper. This scraper is to be used to wipe water off the shower to inhibit mold and mildew formation.

Another component of the bathroom is the toilet demonstration. Toilets consume a large amount of water, for which there are several energy saving techniques. The tour first presents two toilets – a large tank toilet, fairly standard in low-income housing, and a small tank toilet. The difference in water use for these two toilets, and money that would be saved by using the smaller tank is discussed.



Water saving techniques via toilet

However, it is recognized that many households do not have the money to purchase another toilet to save water energy. In response, the tour also includes a demonstration of the use of a "Toilet Tank Bank." The Toilet Tank Bank blows up and fits in the toilet tank, decreasing the net water use. This quick and easy fix costs less than \$10 at a local hardware store.

Notice that the signs in the picture above present information in both Spanish and English. All signs throughout the Energy House are presented in both languages.

D.4 CHILD'S BEDROOM

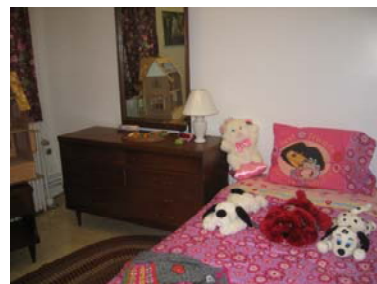
The child's bedroom demonstrates:

- Use of curtains to keep rooms cool/warm
- CFL reminder
- Using clothing to avoid increasing heat

The child's bedroom reinforces no-cost, low-cost energy saving tips. The bedroom includes a very large window, which is covered by draperies. The tour takes this opportunity to discuss using drapes to keep rooms warmer in the winter and cooler in the summer.

Next to the bed is a small lamp, which holds a CFL. The demonstrator shows the lamp and CFL to the group, showing how CFL's can fit into even small lamps.

On the bed sits clothing articles. Typically, the clothes aren't a point of discussion unless someone in the group brings it up. In this case, the demonstrator will note how putting on sweaters and slippers helps manage the need to increase the heat temperature in the house.



Child's room with lamp

D.5 BASEMENT, ATTIC, AND ROOF ROOM

The basement, attic, and roof room demonstrates:

- Energy efficient water heater, and tips for saving energy through the water heater
- Energy efficient furnace
- Roofing repairs
- Attic insulation
- Other technical ways to save energy related to the basement and attic

The basement, attic, and roof room is probably the most technical, information laden room of the house. This room presents some of the most expensive, yet most effective, energy saving tips, one of which is the benefits of installing an energy-efficient furnace.

This room provides the demonstrator with an opportunity to discuss how to save energy through the water heater. First, the group is shown how to reduce the water heater temperature to a maximum of 120 F for every day use, and to the vacation setting for when leaving the house for extended periods of time. The ease and benefits of wrapping the water heater and water heater pipes is discussed at this point as well.



Furnace

Next, the crowd looks to the roofing section. This area demonstrates a deteriorating roof, and the improvements that can be made.

The attic section of the room primarily presents a comparison of a well-insulated and a poorly insulated attic. The demonstration shows the difference in thickness, and discusses how insulation is a critical component to saving energy.



Roof

One other, more technical, discussion that can ensue relates to sealing off the pass-through from areas such as the attic to basement or chimney and plumbing chases. The individual providing the tour for the evaluator said she does not often discuss this, but it is there if individuals are interested.

D.6 WINDOW AND DOOR ROOM

The window and door room demonstrates:

- Sealing drafts on doors
- Sealing drafts on windows
- Costs and benefits of replacing bad windows

The window and door room focuses on ways to stop drafts via windows and doors. The window and door room begins with a door that allows drafts in due to the space between the doorjamb and the door. The demonstrator shows the effectiveness of using weather strips to block these drafts. The weather strips are installed in a matter of seconds in front of the group, showing the ease of the installation process.

Next, the group is shown the difference between newer, energy-efficient windows and older windows. The benefit of replacing old, drafty windows with new windows is discussed and put into financial terms.

While most households cannot afford to purchase new windows, they most likely can afford to purchase the next energy-saving device demonstrated – rope caulk. Rope caulk is presented as the preferred method for sealing off the frame of a drafty window. The caulk fits right into the cracks, sealing it up more effectively. The caulk can also be easily removed and re-inserted in the event someone wants to open the window. Plastic on windows is also mentioned as something good to do, but is presented as a secondary option. One disadvantage of the plastic is that household members cannot as easily remove it to open windows, and it is more costly to replace.

After this last part of the tour, each member of the group is provided with an energy savings kit. The kit includes rope caulk, a water heater temperature gauge, and a pamphlet developed by WE-Energies identifying 101 ways to save energy.